



The Informed Banker
Speaker Series



Friction and The Account Holder Experience

April 18, 2019

The content for this presentation was created by Alix Patterson.
The views and opinions expressed herein are those of the author, Alix Patterson
and do not necessarily reflect those of Harland Clarke.

Presenters



Alix Patterson

Chief Experience Officer
Callahan & Associates, Inc.
alix@Callahan.com



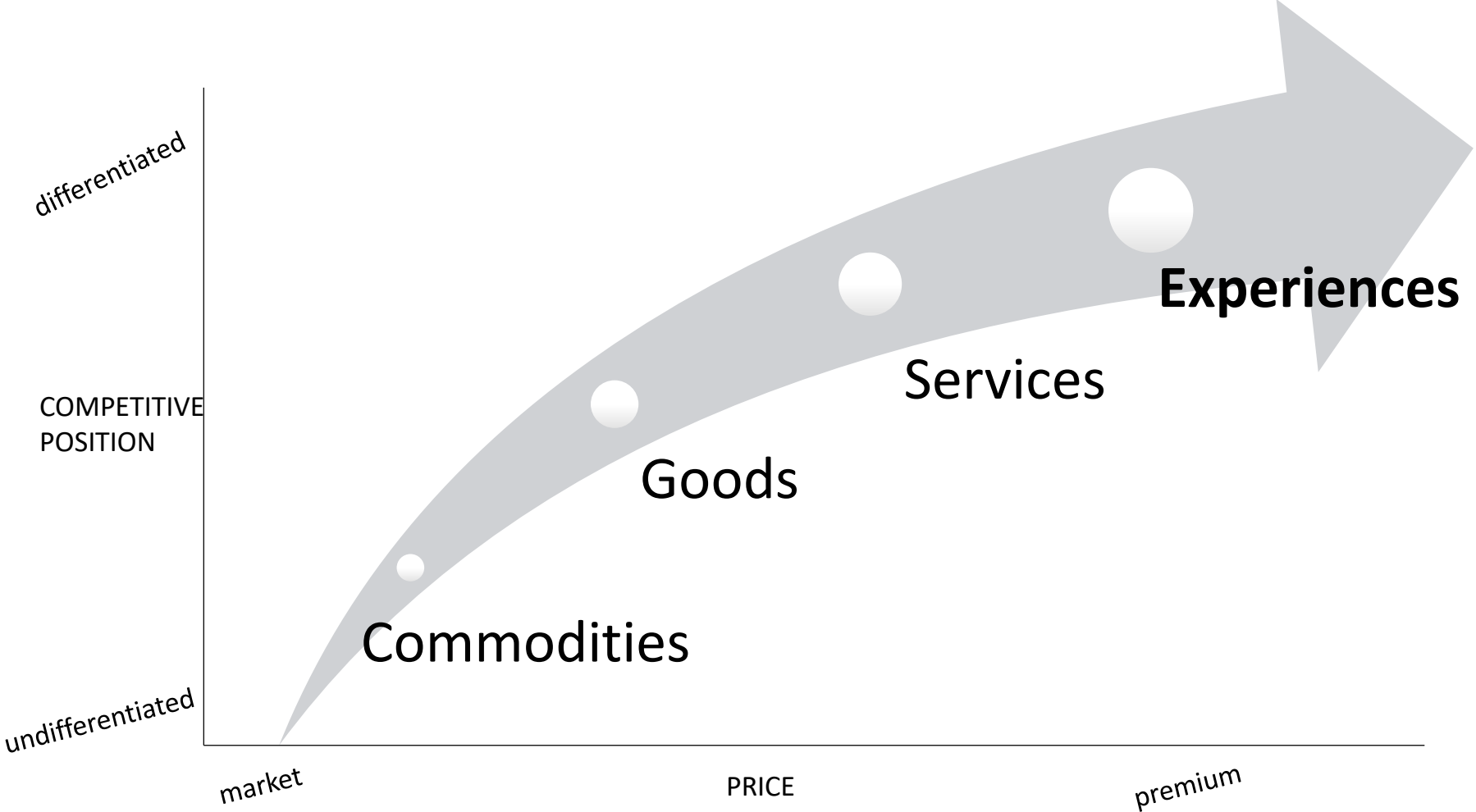
Moderator

Christine Ahlgren

Director, Strategic Business Alliances
Harland Clarke



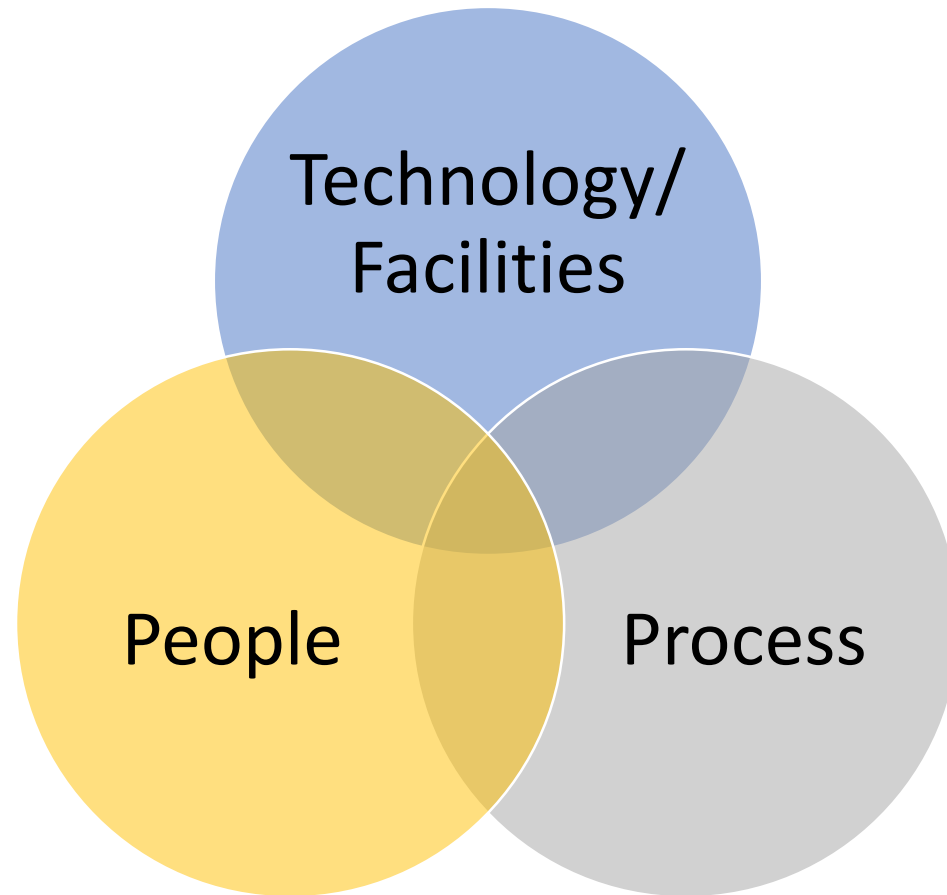
The Evolution of “Value”



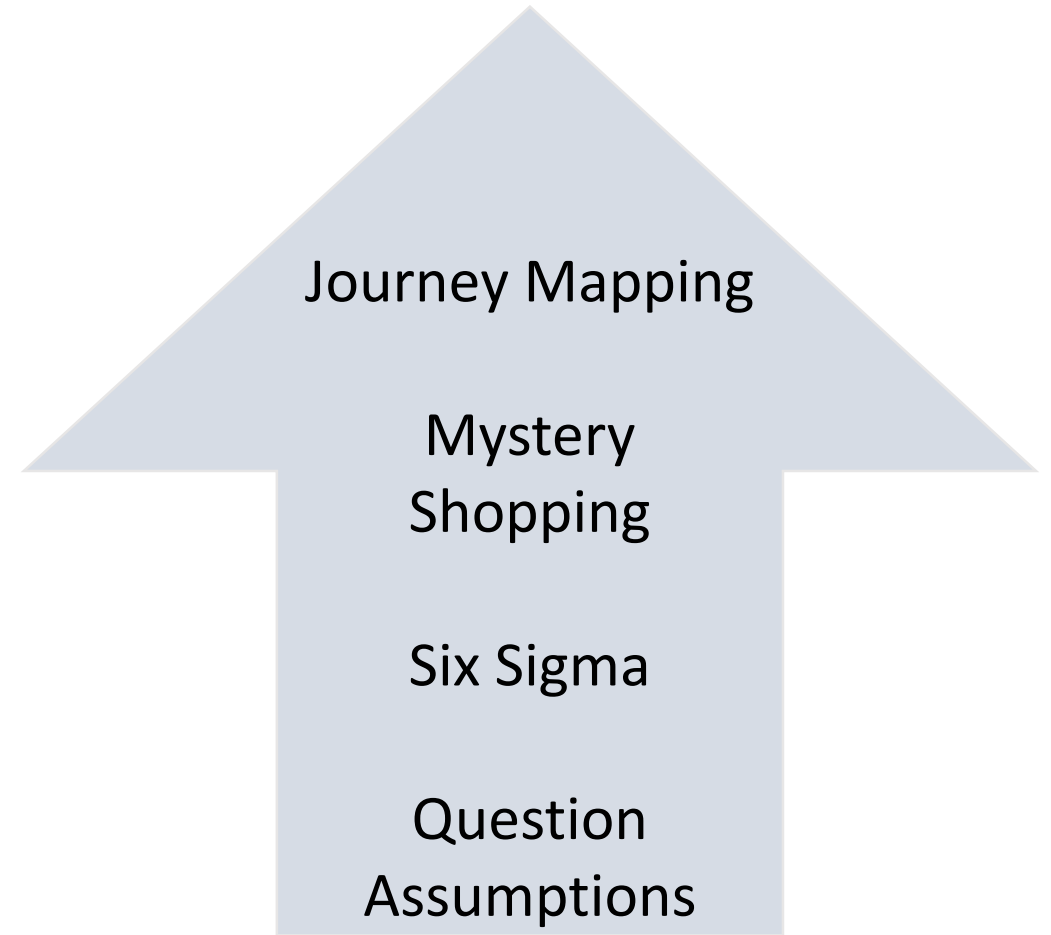
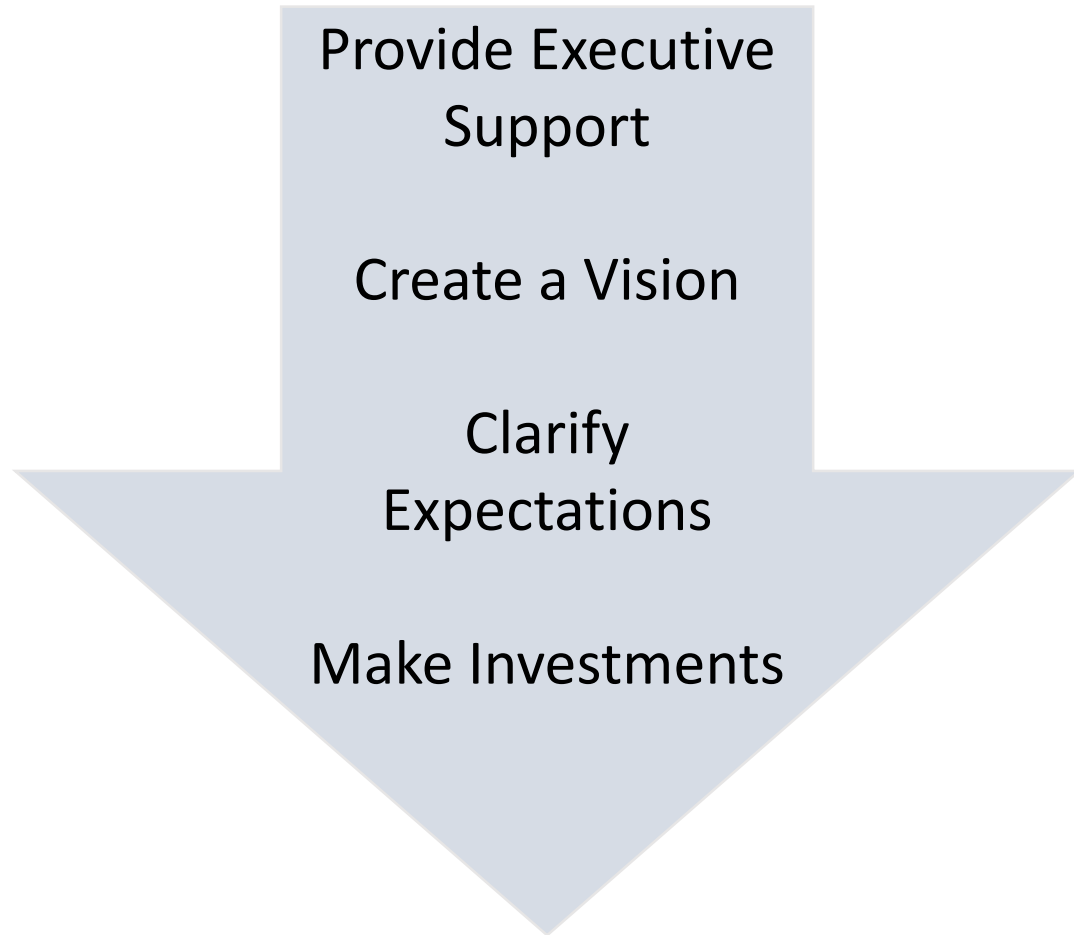
Coffee: From Beans to Baristas



Elements of Experience



The CX/MX Success Sandwich



Invest: Time, Money, Resources



Examples

Member Advocacy Team



Imagination Lab



CALLAHAN
ASSOCIATES

Walk in Their Shoes



Examples

Mystery Shop



Journey Map



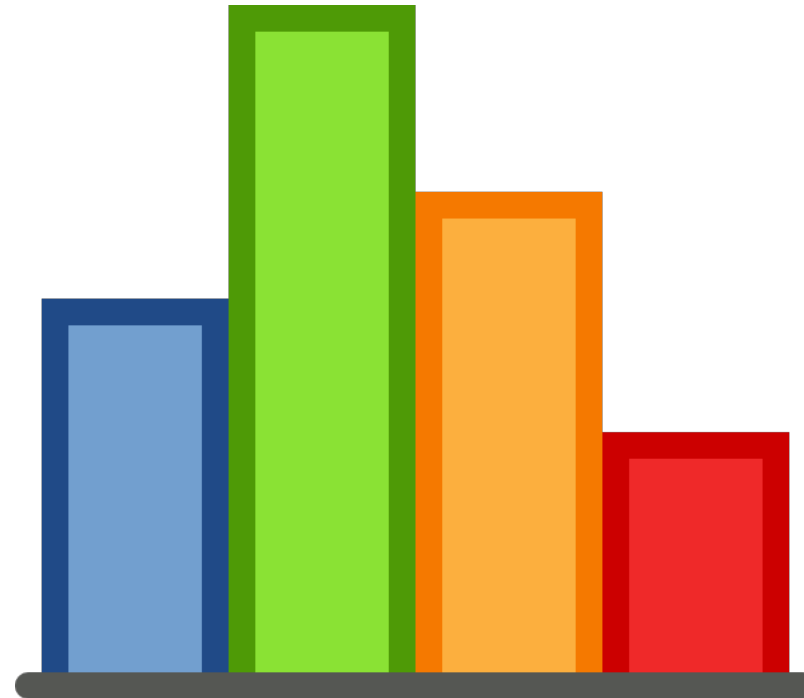
Measure: Qualitative

- customer feedback
- net promoter scores
- member effort score
- employee surveys
- social media engagement
- online customer ratings



Measure: Quantitative

- customer churn
- average account balances
- products per household
- growth



Q&A Wrap Up



The Informed Banker
Speaker Series

Alix Patterson

Chief Experience Officer, Callahan & Associates | [linkedin.com/in/alix-patterson/](https://www.linkedin.com/in/alix-patterson/)

Christine Ahlgren

Director, Strategic Business Alliances , Harland Clarke

www.harlandclarke.com/webcasts

Type your question in the questions panel 

 [harlandclarke.com/LinkedIn](https://www.harlandclarke.com/LinkedIn)

 [harlandclarke.com/Twitter](https://www.harlandclarke.com/Twitter)

***Presentation materials and video replay
will be provided within one week.***