



## Custom Research Studies

Gather and Use Custom Research  
Insight to Improve CX

Custom survey research, data and analysis tailored to meet your specific needs provide critical insight to make informed decisions that help you stand out in a highly competitive market.

Most financial institutions, however, lack the specialized expertise to design and implement the kind of complex data collection and analysis to effectively meet their goals and objectives. Fewer still have access to advanced survey and response analytics required to efficiently execute a custom research plan.

Building a relationship with a knowledgeable partner can help you extract the data you need to inform your decision making and reach your business goals.



## Why Harland Clarke for Custom Research and Analysis

Here are examples of recent custom research studies conducted with the help of Harland Clarke:

Custom Research Studies from Harland Clarke combines our industry expertise and acute awareness of the financial services market with groundbreaking innovation powered by Customer Service Profiles (CSP) to plan, implement and deliver a custom research program that fits your institution's goals and budget.

### Brand Awareness and Image Positioning Study

#### GOALS RESULTS

Grow credit union membership by:

- Comparing its brand awareness to key competitors
- Learning how consumers in their service area view its brand
- Determining how much its name is a barrier for member growth

- Identified the credit union's primary competitors
- Measured brand perception, strengths and weaknesses within its market
- Delivered a barrier gap analysis of its name and desired member growth goals

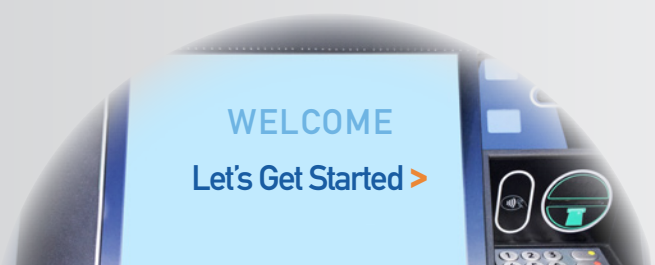
### Customer Sentiment and Usage Analysis of Interactive Teller Machines (ITMs)

#### GOALS RESULTS

Survey current retail customers in select markets to:

- Determine whether to increase the number of ITMs
- Learn the best locations for new ITMs

- Detected educational efforts needed due to low customer awareness of ITMs
- Learned which demographic groups, in which markets and locations, used? and had the most interest in ITMs
- Identified best markets and location for additional ITMs
- Revealed ITM features and capabilities that most appealed to customers for creating more relevant and effective marketing promotions



## COVID-19 Lobby Reopening Preferences

### GOALS

To guide the planning and implementation of lobby reopening strategies, conduct a survey of consumers to understand:

- COVID-19 safety precautions that provide the most comfort to consumers
- How COVID-19 has impacted consumers' relationship with their financial institution

### RESULTS

- Identified COVID preventative measures with the most positive impact
- Set expectations for lobby traffic during reopening
- Revealed number of households reporting negative financial impact from COVID-19
- Provided extent of increase in use online and mobile banking tools



## Business Banking Pulse Check

### GOALS

Conduct a business banking relational study to:

- Check in on the needs of business customers
- Establish regular engagement intervals for gathering feedback and tracking trends
- Create a dimension of time-related results analysis

### RESULTS

- Provided institutions with a relationship health assessment of business customers
- Informed of utilization and satisfaction levels of products and services
- Verified customers' primary contact and measured the level of service received
- Created opportunity for additional questions to gather additional feedback, i.e., topics of interest, etc.



## Consumer Banking Pulse Check

### GOALS

Conduct a survey on regular intervals to:

- Check in on the needs of customers/members
- Establish regular engagement intervals for gathering feedback and tracking trends
- Create a dimension of time-related results analysis
- Identify opportunities for improvement

### RESULTS

- Provided institutions with a relationship health assessment of customers/members
- Informed of utilization and satisfaction levels of products and services
- Assessed the impact of mergers and acquisition on customers/members
- Delivered valuable brand perception feedback
- Created opportunity for additional questions to gather additional feedback, i.e., topics of interest, etc.



## Ad Testing

### GOALS

Test a new checking account offer across several states to:

- Determine areas with the highest response rate
- Valuate the importance of select elements of the offer

### RESULTS

- Determined regionality had no effect on offer response rates
- Identified most/least important features among recipients by segment



## Get custom research and insight that fuels better CX

Your customer experience is your most valuable asset. Protect it with a clear understanding of your institution's opportunities and challenges. Let Harland Clarke's innovative research solutions deliver the insight you need to develop your path to increased revenue, retention and profitability.

Obtain the custom data and analysis you need to build a customer experience program that drives loyalty and revenue.

## The Power of Partnerships

Harland Clarke is a Vericast® business. We offer the advantage of having access to a variety of capabilities through our seamless and collaborative strategic business partnerships with other companies under the Vericast brand.

We leverage these relationships to provide the expertise and resources our clients need to achieve their goals — particularly, in the areas of research, business strategy and development, data science, and multichannel engagement.

Count on us.

Call **1.800.351.3843**

Email **contactHC@harlandclarke.com**

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