



Overview:

A leading regional bank contracted with J.D. Power and Associates to perform operational research into key processes and procedures surrounding customer experience and engagement. J.D. Power worked closely with the client to develop a mystery shopping program that encompassed branch and call center interactions. The development of this program led to an enhanced evaluation of primary customer satisfaction interactions—from the parking and facility, to the accuracy of transaction completion. This further enabled the client to develop and implement key best practices aimed at satisfying the customer and going above and beyond industry standards.

Client's Issue and Objective:

The client was looking to refocus on the customer experience and work toward improving satisfaction. The overarching objective was to improve on all fronts within J.D. Power's syndicated rankings in the *Retail Banking Satisfaction Study*. To accomplish this, J.D. Power outlined a program that followed and benchmarked the key diagnostics from the study that would promote a superior customer experience.

How J.D. Power and Associates Helped the Client:

J.D. Power and Associates developed a complete program to assess teller, platform, and call center performance by focusing on several process components involved in a single transaction. Those process components included:

- Initial customer interaction
- Assessment of customers' needs
- Product demonstration
- Store advantages
- Facility audit

Results:

J.D. Power and Associates successfully executed a program that focused on branch and call center performance. The client has been able to utilize this information to create and implement the following:

- Training sessions surrounding key performance drivers of customer satisfaction
- Further development of internal measurements and communications to develop a culture of customer service excellence

Working together in an initial effort to improve all customer touch points, J.D. Power and the client developed a full-scale program to evaluate customer service practices, lead change-management initiatives, and implement best practices, at the same time reducing service gaps and creating a more consistent experience in customer care.