

## **GETTING TO KNOW YOU !**

### ***A Meeting Catalyst***

We appreciate how important your time is and understand that you must prioritize your schedule every day. Our goal is to maximize your results while minimizing your investment of time and money. We accomplish this through a four step process:

- 1) Discovery
- 2) Development
- 3) Implementation
- 4) Measurement

The following questions are essential to the Discovery Phase. It is important that we understand your current situation both internal and external.

How you use this list is entirely up to you:

- You can review the questions to gain insight into how we work
- You can answer these questions in writing and return to us, this allows us to better prepare for our next meeting
- You can wait until our next meeting and we can review all of the questions that are important to you, at that time

### ***Marketing***

- 1) What is your current sales and marketing strategy?
  - a. What is working well?
  - b. What would you like to improve?
- 2) Who is involved in marketing? What are their positions?
- 3) Have you tried a unique marketing campaign in the past to bring in customers?
- 4) COMPETITION:
  - a. Tell us about your competition
  - b. Is there anything about their marketing approach that stands out to you?
  - c. Why do you think people choose X over your bank?
  - d. What do YOU think is your competitive edge?
  - e. What do YOU think you need to do in order to really STAND OUT in your community?
  - f. How do you set yourself apart from your competitors?
  - g. What geographical area do you consider to be your sphere of influence?
  - h. What is the most significant issue you face today regarding sales and marketing?
  - i. How do you measure your market?

## **Customers**

- 5) Describe what customer service initiatives you have in place?
  - a. How is your customer service different from your competitors?
- 6) What is the top reason that people bank with you?
- 7) How do you measure your customer satisfaction?
  - a. Do you use a survey? Or some formal means of measurement?
  - b. When you lose a customer, do you track it and
  - c. Do you know why you lost that customer?
  - d. What measures do you take to win that customer back?
- 8) How would you define your customers?
  - a. Would you like to have a different customer profile?

## **Employees/Training**

- 9) Do your employees have formalized goals?
  - a. Are they measurable?
  - b. Are bonuses a direct correlation to performance?
  - c. With regard to bonus expense, do you consider your ROI to be good?
- 10) TRAINING:
  - a. How often do you provide training for your staff?
  - b. Who receives training?
  - c. What type of training?
  - d. How well is it received?
  - e. Do you use external or internal trainers?
  - f. What other training needs do you have?
  - g. Have you followed up training in the past with daily/weekly/monthly reminders?
- 11) DEPARTMENTS:
  - a. What are your major departments (mortgage, investments, etc.)?
  - b. Are they branded?
- 12) GENERAL:
  - a. Do you have an organizational chart?
  - b. Do you have formalized Team Selling and Cross Selling?
  - c. Have you done incentives in the past?
  - d. If so, what were your past incentives and how successful were they?
  - e. What is the best thing about your bank?
  - f. What is the worst thing about your bank?
  - g. Do you use mystery shoppers? If so, what type of follow up actions do you take?

## **Events**

### 13) EVENTS:

- a. What type of customer events have you had at your bank?
- b. Who was invited? How (invitation, announcement in newspaper, calls)
- c. How successful were these events?
- d. How did you gather feedback?
- e. Can you identify a reasonable amount of new business as a result of these events?
- f. Do your customers LIKE to attend events?

## **Product/Services**

### 14) PRODUCTS:

- a. What is your most profitable product?
- b. What are your best products?
- c. What is your most popular product?
- d. Are any of your products branded?

## **Growth Plan**

### 15) GROWTH:

- a. How much or how large would you like to see the bank grow?
- b. What are your established objectives?
- c. Where would you like to see the biggest improvement?
- d. Are you pleased with your share of Realtor Referrals?
- e. Is your non- interest income at a satisfactory level?
- f. Would you say that your Bank has a Sales Culture?