

SERVICE OPPORTUNITY ASSESSMENT



If your organization is experiencing an increase in telephone contacts with customers as a result of social distancing requirements, we have an assessment that will help examine what your customers are experiencing when interacting with your staff.

KEY PROGRAM OBJECTIVES

The Service Opportunity Assessment (SOA) is a 90-Day program designed to meet two important objectives.

1. Provide an assessment of customer experiences when they contact the bank by telephone.
2. Provide summary reports to examine the bank's customer service performance.

PROGRAM ADMINISTRATION

SOA evaluations are administered using service interactions initiated by your bank's customers, trained and managed by Cross Financial. All evaluations include important criteria focused on customer service skills that should be used to support existing customer relationships and product utilization.

TELEPHONE CONTACT POINTS

You select a telephone number that handles customer service contacts and your SOA program will complete 15 customer service inquiries, using that number, during a 90-day evaluation period. The evaluations are distributed five per month for three months.

PROGRAM SET-UP AND ADMINISTRATION

Program set-up is easy. Simply select the telephone number of a branch or department you would like to evaluate and assist with the recruitment of customers willing to complete a service evaluation. Cross Financial will do the rest. Monthly SOA reports summarize ratings for a quick assessment of your staff and bank performance.

90-Day Service Opportunity Assessment.....\$1,750

Five evaluations will be completed each month for three consecutive months, providing you with 15 total telephone assessments for each telephone number being evaluated.

Custom program structures can be developed to fit your bank's telephone customer service model.

“Customer retention is the only metric that matters. When you focus on customer retention, by default you have to be exceptional at client care.”

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