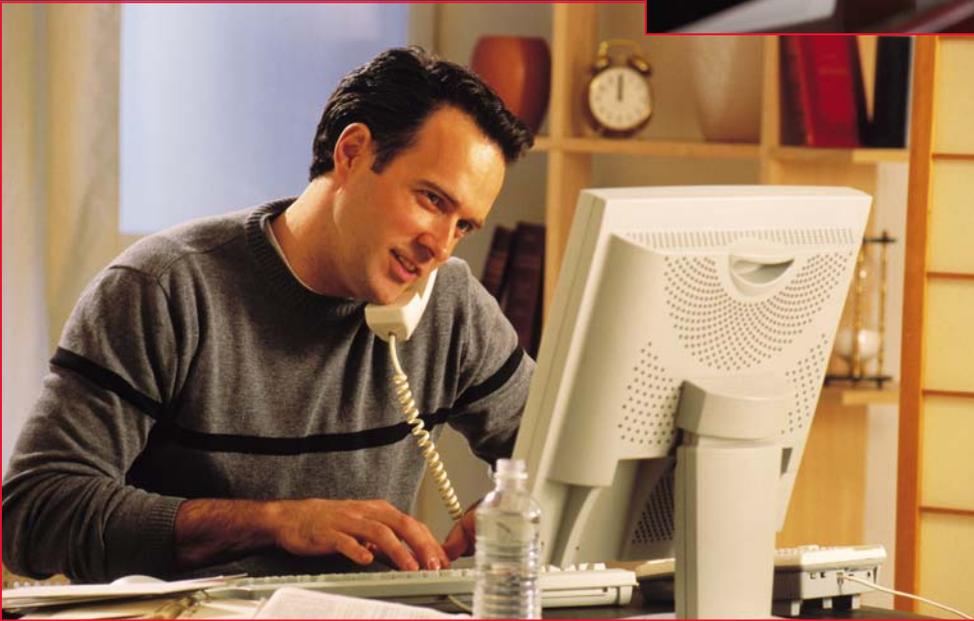


*Do you know what kind of experience you give potential members?*



### *New Perspectives*

**From a CEO:**

*"We are much better prepared today than we were a year ago."*

**From a Manager:**

*"Without these shops, we just wouldn't know. I think this information is priceless."*

**From a Customer/Member Service Representative:**

*"This information is very helpful in my coaching and I'm learning as well."*

If your marketing efforts aren't getting the results you expected, there may be a disconnect between your credit union and potential members.

### *Non-Member Experience Audit*

Does your organization make it easy for non-members to join the credit union or sign up for new products and services?

With Profound Communications' Non-Member Experience Audit, you can measure the quality of interactions your credit union has with potential customers. The Non-Member Experience Audit allows you to gauge:

- What kind of experience prospects have when they call your credit union or visit your website?
- Do prospects get the information they request?
- Can prospects easily enroll online or by phone?
- Do your credit union employees ask for the sale?





## Efficient, Reliable Results

### Why Are Non-Member Experience Audits Important?

If a potential member walks into a branch, the credit union is ready to seal the deal. We're people people, after all. No one outdoes us in face-to-face interactions.

But what if, and this is a much more likely, a non-member calls about a marketing offer or visit the Web site to gather information? Do we ask for the sale? Do we have an easy online process to enroll new members? Too often a disconnect occurs and we lose those prospects without ever knowing it.



By auditing the non-member experience at your credit union, you may discover deficiencies, and opportunities, you never knew existed. If the credit union captures half, or even just 20 percent of the prospects you may be losing now, just think of what that might mean for your member recruitment and new account goals.

Tammy Holtzmeier, CEO, Profound Communications  
In CU Times Magazine

### Set It Up

Get started with our Non-Member Experience Audit today!

We'll entirely refund our fee if your first audit fails to identify any Level One Critical Deficiencies requiring action within your financial institution.

Call Profound Communications at 800.250.5146 or visit our website, [www.profoundcommunications.com](http://www.profoundcommunications.com), to learn more.



### Go Behind the Scenes at Your Credit Union as a Prospect

The Non-Member Experience Audit allows your credit union to:

1. Test response time and accuracy on requests for information via e-mail and website forms.
2. Assess phone interactions with prospective members.
3. Confirm that employees ask for the sale.
4. Evaluate messages left for prospects via e-mail and voice mail.
5. Review offers made to various potential members based on their perceived needs.
6. Measure their experience when responding to specific marketing offers or making a general inquiry.
7. Gauge the quantity and quality of follow-up interactions.

Find out what kind of first impression your organization makes by phone and online services.

### Non-Member Experience Audits Get Results

*"Thank you to the team at Profound for providing this valuable information and feedback (Experience Audit). It has had a "profound" impact on the entire Sales and Services Management team, the way in which we conduct ourselves, our action plans for the team, our one-on-one coaching, team meetings, etc., etc... and the continuous follow-up/check-up on our levels of service to each and every member."*

**Donna Stenoski**  
AVP of Sales & Service  
Northern Federal Credit Union

# Non-Member Experience Audit Worksheet

## Get Started Today!

Please complete this worksheet to provide Profound Communications with a basis of knowledge to use to best complete for you the Non-Member Experience Audits.

### Audit Logistics

1.) Would you like Profound to complete audits via the phone, Internet or both? \_\_\_\_\_ Phone \_\_\_\_\_ Internet

Please indicate how many of each type of audit you would like Profound to conduct. \_\_\_\_\_ Phone \_\_\_\_\_ Internet

2.) Are there specific days of the week when you would like the audits to be completed? \_\_\_\_\_  
\_\_\_\_\_

3.) Are there specific times of the day when you would like the audits to be completed? \_\_\_\_\_  
\_\_\_\_\_

4.) Are there certain branches you would like Profound to audit? \_\_\_\_\_  
\_\_\_\_\_

5.) Are there certain staff members you would like Profound to audit? \_\_\_\_\_  
\_\_\_\_\_

### Audit Scenarios

6.) What products and services would you like Profound to inquire about while conducting the audits? \_\_\_\_\_  
\_\_\_\_\_

7.) Are there any current promotions that you would like Profound to inquire about? \_\_\_\_\_  
\_\_\_\_\_

8.) Have there been any recent product or service training sessions? What topics were covered in these training sessions?  
\_\_\_\_\_  
\_\_\_\_\_

9.) Are there any specific scenarios you would like Profound to use when conducting audits? Some examples include:

a. - A non-member from out of state that wants to open a checking account online.

b. - A new mover to the area who wants to join the credit union.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





# Make Sure You Are Connecting With Your Prospects

## Non-Member Experience Audit

	Quantity of Audits			
	1 to 5 Audits	6 to 10 Audits	11 to 20 Audits	21 or more Audits
Cost Per Audit	\$359	\$329	\$299	\$279

<input type="text"/>	Please indicate how many Audits you would like Profound Communications to complete. <i>A minimum of three audits is required.</i>		
	<input type="text"/> # of Phone Audits	<input type="text"/> # of Internet Audits	
\$ <input type="text"/>	Total		

Audit Reporting—Profound Communications will provide a written analysis of each Non-Member Experience Audit. Once all audits have been completed, Profound will provide a phone conference debriefing to your credit union management team.



### Non-Member Experience Audit — Getting Started!

To begin setting up your Non-Member Experience Audit program, fill out the form below and return it to Profound Communications, Inc.

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Work Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Please complete and fax to **614.844.6993**. Project will be placed into production as soon as your requested is received.

