

## USING KEY SURVEY DATA, AMERICA FIRST ENHANCES CUSTOMER SERVICE AND INTERNAL PROCESSES

“We needed to find a way to gather data

- a. from our online members, for the website, and
  - b. to survey internally, a quick and efficient method,”
- said Tamika Gallegos, Vice-President of Service Quality at America First, the thirteenth-largest credit union in the United States.

One of Gallegos’ assistants began looking at the available services, beginning with a list of about twenty-five companies. “Through his extensive research,” Gallegos said, “he got it down to two, and we ended up going with Key Survey for the functionality, the ease of use and the reporting. It was a very easy to use system.”

“We use it for anything where a member does something with us,” said Lisette Thurgood, a research analyst in the department, “and we want to get feedback on that process. And then we also use it for internal surveys, so that we can get feedback from our employees on our processes, and the things that we can do to improve them.”

The surveys are formatted in the same way as America First’s website. “It looks seamless as far as the transition,” says Thurgood. “We’ve customized the URL so that it just looks like another part of our site.”

“This last year,” Thurgood says, “we’ve been using it a lot more. Other departments are realizing that we have this tool and how we’re using it to gather feedback, and they’re asking us to do surveys.”

These include an employee exit interview for the HR department.

“We ask them a series of questions,” says Gallegos, the VP of Service Quality, “about 401k and benefits, asking what we can do better. There’s also a survey that we do for our operations services department, which is a huge touchpoint for all the employees in that department.”

“Once we get the data back, we use it to make recommendations in the organization to improve the services that we provide, to improve the processes or policies that we have in place so that we can better serve our members,” said Thurgood.

America First’s main use for Key Survey is to conduct membership and electronic-services surveys. When a customer does online banking on a particular day of the month – the days rotate so that the credit union can get a broader spectrum of customers – and goes to log out of their account, they receive a pop-up window inviting them to participate in the survey.

One of the two surveys asks about what the customer uses the online services for and how frequently, and how America First compares to other institutions that offer online banking services. The other survey asks how frequently the customer uses a branch and why, how frequently they use a call center and why.

Typically, each survey gets about five hundred responses a month.

America First also has another survey, always available – actually more of a feedback form. “That one,” says Thurgood, “allows customers to give a suggestion, talk about

an issue or a concern, or provide a compliment about a department, a branch or an individual. Customers also use it for things like pointing out typos on our site.”

Once the data is gathered, senior management reads the reports – department executives and especially the people running the website. Key Survey has helped them to baseline service and then to measure it going forwards – setting specific standards and goals, and see their progress towards them.

“We’ve seen definitely increased service,” says Gallegos. “We’ve been able to gather information on why employees haven’t been using 401k programs and see if we’re able to improve services. We’ve been able to identify areas that need improvement within the credit union. And what we do then is enhance our systems, our processes and our behaviors due to the feedback.”