



FINANCIAL



What your customers really think!

The development of **Active Mystery Shopper®**, our mystery shopping service has been mainly garnered from experience on projects in the financial and banking areas of business.

Whether you operate as a **bank**, or in the area of **insurance, assurance, mortgages, investments, or savings** you're dealing with people, dealing with customers.

Importantly, you're dealing with their money and finances, and in this area **customer service is paramount**. Keeping customers happy in every way where your business touches your customers is crucial. With ever **increasing competition and compliance** requirements customers are now more aware and more likely to move than previously, quite often the only discerning factor between you and your competitor is in the area of customer service. It is something you have to monitor.

For financial service organizations **compliance** is becoming more important. You have to know that your people can meet the needs of your customers in a way that ensures that customers are getting good advice and that products and services are being offered and arranged by competent and qualified people.

From January 1st 2007, the Financial Regulator requires staff working in all financial services organizations who sell, or provide advice on certain retail financial products to have a minimum level of competency

Active Mystery Shopper® service from Direction Research is ideally suited to ensuring that your people are trying to meet customer needs while at the same time **independently** checking that your staff are demonstrating that any compliance requirements are being met.

For more information please refer to:

<http://www.activemysteryshopper.com>

<http://www.activemysteryshopper.com/financial.htm>

http://www.activemysteryshopper.com/balanced_score.htm

Do your
customers
feel welcome?

Are you
compliant?

Are your
staff
capable?





Benefits

Active Mystery Shopper © is a combination of qualitative and quantitative observational research which provides a more in-depth view on how your customers are being treated on a one-to-one basis.

- | Customer Service
- | Employee service standards
- | Measure level of helpfulness, how knowledgeable, courteous and efficient your employees are
- | Focus on sales performance
- | Look at pricing
- | Compliance (saying the correct things, displaying, merchandising, stocking products) and **now regulatory compliance!**

Benefits of Active Mystery Shopper Shopping Programme

- | Over time, a continuous mystery shopping programme can...
- | Monitor levels of service and performance over time
- | Monitor the effects of any improvement initiatives
- | Allow you to compare by outlet, department, team, region etc.,
- | Spot opportunities for improvements

Which can be used to ...

- | Increase awareness amongst employees of good customer service and its importance fostering a more customer centric approach.
- | Reward good service and increase overall quality of service to customers.
- | Decrease customer churn.
- | Ensure compliance.

To learn more about how Active Mystery Shopping can help you, feel free to get in touch with us:

