

Bank Improves Customer Service With Customized Mystery Shop Program

Challenge

A thrift-based community bank known for its focus on customer service was unhappy with the “cookie cutter” approach its mystery shopping vendor provided. It wanted a vendor that could produce customized reports based on specific goals and quarterly product promotions. The bank, which had 110 employees at 10 branches, was aware that its tellers and platform personnel did not always adhere to required customer service guidelines. It wanted the mystery shop vendor to measure results in this area, too.

Solution

The bank chose Harland Clarke as its new mystery shop vendor. Harland Clarke conducted two baseline mystery shops. Each branch was shopped twice and the average of the

two shops became the baseline measure. Thereafter, each branch was shopped once per quarter. In addition, each of the bank’s three customer call centers was shopped quarterly via telephone.

Each branch mystery shop looked at two measures:

1. A facilities score, which took into account such factors as cleanliness and supplies
2. Scores for both tellers and platform personnel

Each employee group was assessed on the attributes that reflected its scope of responsibilities. Platform personnel were evaluated for proper attire, friendliness, level of service, knowledge of products and services, transaction handling, needs assessment, and cross-sell initiative.

Results were categorized by facility score and staff (teller, platform personnel, call center) score, as well as by branch and department.

Scores were reviewed by the appropriate departments and branch managers, and served as input for decisions regarding target areas for improvement.

**Over one-year
period ...**

5% improvement
(79-84%) overall
organizational scores

9% improvement
(76-87%) teller scores

5% increase (81-86%)
platform scores



Results

Across all measures, scores rose after implementing Harland Clarke's Mystery Shop program, meeting or exceeding the 80 percent minimum and 85 percent goals set by the bank. Overall organizational scores for the bank's staff rose from 79 to 84 percent the first year. During that same period, teller scores increased from 76 to 87 percent and platform scores from 81 to 86 percent. There was a drop in call center scores in the first nine months, due to staff turnover. However, those scores rose to 80 percent over the following quarter as the new team got up to speed.

The bank's management team credited Harland Clarke Mystery Shop with fostering improvement in the customer service orientation of its branch and call center staff. They were especially pleased with Harland Clarke's ability to customize each shop on a quarterly basis, as needed, and to design new mystery shops to accommodate their evolving requirements and objectives.

To learn how Harland Clarke can help
improve customer service levels,
in your financial institution, call **1.800.351.3843**,
email us at **contactHC@harlandclarke.com**
or visit **harlandclarke.com/MysteryShop**.

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