

## Member Surveys - Why & How

**Why do a member survey?** Is the information from complaints and compliments not enough? Aren't the metrics your data systems produce sufficiently reliable decision making tools?

**You may not like the answer.** Perceptions are more important than Facts to consumers. To accurately measure your CU's success and to plan for the best possible future decision makers need to know what members think and feel.

In today's emotion-driven financial marketplace you can never have too much information about expectations and perceptions. Join credit union authority Carolyn Warden as she discusses the essential processes for obtaining reliable information on perceptions and then putting that data to work effectively.

### **This program covers:**

- Setting obtainable goals for a survey.
- Selecting and designing the collection instrument, be it a survey or focus group.
- Choosing the sampling process which best fits your goals.
- Managing the process of data collection and analysis.
- Presenting the results to support the needs of decision makers.

### **You'll also receive rules, tips, and tricks for:**

- *Avoiding wording pitfalls that skew results.*
- *Identifying appropriate distribution and analysis methods.*
- *Utilizing survey data to elevate processes for increasing member retention and CU profitability.*

### **Who Should Attend?**

Those who gather data and determine the array of products, services, delivery channels, and pricing, especially in these positions:

- Marketing professional.
- C-level executives.
- Service Delivery & Operations Managers.
- Lending & Business Development Leaders.

### **What Participants say about the instructor:**

*"Carolyn did a fantastic job presenting. I could have listened to her for a couple more hours..."*

*"Presented material in a very easy to understand format, applied and related it all together too!"*

*"Provided info in a very clear and entertaining way."*

*"Answered questions with thoughtful and intelligent answers."*

*"Her experience really showed. She was very creditable."*

*"Easily one of the most informative speakers I have yet heard."*

**Meet the presenter, Carolyn Warden:**

Carolyn Warden has experienced CU operations from all sides of the management desk, having served as an NCUA examiner, CEO & CFO of four credit unions, education director for a large data processor, Director of Research and Information for the NJCUL, and co-author of a number of books and articles about credit unions. She earned the Certified Credit Union Executive designation in 1997.

Her credit union clients range from chartering groups to over \$1 billion in assets, and are located from New York City to Alaska and Hawaii. She coaches her clients through challenging situations by providing information and identifying options, as well as training and coaching management to implement change as a stretch and not stress.