



## Customer Perception Edge Analysis

In an increasingly competitive market, banks and credit unions have to continue to set themselves apart in unique ways. This study helps you see your industry through the eyes of the consumers. You will gain key insights to develop and market the right products to consumers. This study is based on sponsoring banks and credit unions.

Clarocision Research & Marketing has developed a tool to provide actionable results for companies seeking to retain current customers and gain new ones. Below is a sample, which was prepared for the financial services industry. Specifically, this study was prepared for credit unions and compares members' perception of credit unions with that of banks.

### RESEARCH OBJECTIVES:

- Incidence and awareness of current business services
  - Future services expected by members
  - Awareness of credit union philosophy
  
- CU Brand Positioning
  - How is your CU perceived by members
  - Developing the IDEAL strategies to deal with current economic climate
    - How far off is your business from the member's perspective?
    - What are your member's expectations in current economic conditions?
  - Perceptual Image Mapping
  - Advertising & Promotional activities
  
- Perception of Banks vs. Credit Unions
  
- Consumer confidence in CU vs. other Financial Institutions
  
- Demographics & Psychographics Data



**METHODOLOGY & SAMPLE SIZE:**

Customer perception research data -- Before proceeding to quantitative customer perception research, we identify and create core attribute factors which, based on preliminary findings, account for most of the differences in customer perception.

We will develop and design a research tool (questionnaire) that is tailored to meet your information needs and will provide a window into your marketing opportunities and a path to an effective marketing strategy. Our research project examines a broad range of demographic and psychographic determinants; including, identifying the 'ideal brand' for each segment.

For this particular research we recommend a sample size of **\*400 respondents per credit union:**

- 200 Heavy Users
- 200 Light Users

**CALENDAR OF EVENTS:**

PROJECT STEPS	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6	WEEK 7	WEEK 8	WEEK 9
Initial Meeting	█								
Questionnaire Development & Approval	█	█							
Training & Instrument Testing		█							
FIELD WORK			█	█	█				
PROCESSING					█	█			
Analysis & Reporting							█	█	
Final Report Concluded								█	
Final Results Presented to Client									█

\*The sample size vary depending on the size of the institution.

SAMPLE GRAPHIC MATERIAL (For visual aid purposes)

