

BankFIRST® Maintains “Gold Star” Service With Mystery Shopping



Customized Program and Detailed Insight Make All the Difference

Background

BankFIRST® was founded in 1989 with a specific mission in mind — to serve as the premier community bank for small business in Central Florida. Today, with 12 branch offices and assets of more than \$662 million, the bank is deeply committed to delivering friendly, attentive service.

The bank’s industry-leading Gold Star Quality Service Program is based on consistently delivering an exceptional banking experience while continually exceeding client expectations. BankFIRST wants each branch visit to be so memorable that its clients “cannot help but share their experience with others.”

Challenge

The bank was looking for a mystery shopping partner that was responsive, accessible and strategic. “Our employees were frustrated because they didn’t feel like they were getting all the information they needed from the current mystery shopping visits and reports,” said BankFIRST Executive Vice President Julie Kleffel. “We needed more helpful feedback and more thorough, insightful reporting.”

The stakes were high: bank employees earn incentives based on their mystery shopping scores, and the institution’s Gold Star Quality Program training relies on mystery shopping feedback. BankFIRST needed a mystery shopping partner that could help the bank not only maintain the highest service levels, but also help turn that outstanding service into sales.

Solution

BankFIRST selected Harland Clarke based on its experience and approach. “I knew immediately that Harland Clarke was a fit with us because of their focus on service,” Kleffel explained. “We had a lot of interaction with the Harland Clarke team before we launched the program, including a series of implementation strategy calls and detailed conversations to get the shopping scenarios just right. It was obvious that Harland Clarke understood what we were looking for. They were happy to work with us to develop a mystery shopping program based on our very specific requirements.

“We’re getting exactly what we need from Harland Clarke. Their financial industry experience is crucial ... the EnGauge online reporting is outstanding.”

*- Julie Kleffel,
Executive Vice
President, BankFIRST*

The program began with a baseline shop of all 12 branches — two in-person shops at each branch — along with telephone shops and facilities evaluations. The program continued with once-per-quarter shops, both in-person and by phone.

Each in-person shop measured two specific areas: the facility (interior and exterior) and the overall customer service levels and skill sets of the tellers and customer service representatives. Along the way, the team tweaked the customized scenario clues related to certain areas of interest, and coached shoppers about questions to ask to elicit the desired performance data.

Using Harland Clarke's EnGauge online tool, shopper feedback was immediately available to the bank.

Results

Given its organizational focus on service, it's no surprise that BankFIRST scored extremely high on its mystery shops. But according to Kleffel, that wasn't really the point. "We know our associates do an excellent job," she said. "This program highlighted not only the areas where we are succeeding, but also where we can do better."

"Reading the shoppers' detailed observations is invaluable," Kleffel continued. "The outcome is that we can give our sales managers very specific things to coach and role play. There's no question that mystery shopping from Harland Clarke raises the bar."

Kleffel says BankFIRST is going to continue the program. "We're getting exactly what we need from Harland Clarke," she said. "Their financial industry expertise is crucial, and the personalization of the program lets us hone in on precise areas for improvement. The mystery shoppers are trained extremely well and give extensive feedback. And the EnGauge online reporting is outstanding — I can pull reports in seconds."

What This Means to You ...

Mystery shopping is the perfect way to experience your brand as your prospects and account holders do. Using knowledgeable, experienced shoppers who fit your demographics, Harland Clarke can help you measure your performance, improve training and grow your account holder relationships.

Working with Harland Clarke's Mystery Shopping provides:

Strategic input. We work closely with our clients to develop mystery shopping programs that align with their corporate objectives.

Immediate reporting. Our EnGauge online reporting tool lets you monitor shops as soon as our shoppers input data.

Customized programs. Each program is individually designed to fit your institution's needs, and fine-tuned along the way to ensure that you're getting the feedback you need.

Industry expertise. Harland Clarke has more than 100 years of experience in the financial services industry. We work solely with financial institutions, so we speak your language and are familiar with the challenges you face.

Consumers expect more today from their financial institutions. How can you effectively compete to be the financial services provider of choice? By setting standards for quality service, measuring your brand's performance and putting Harland Clarke's Mystery Shopping intelligence to work toward your institution's continuous improvement.

Many variables impact marketing campaign success. The information on earnings or percentage increases that is contained within this case study is provided for demonstrative purposes only. Harland Clarke does not guarantee or warrant earnings or a particular level of success with a campaign.



Harland Clarke
**Lifecycle
Marketing**

Harland Clarke provides best-in-class solutions throughout the entire account holder lifecycle — from acquisition to onboarding to cross-sell. We utilize insight-driven strategies across multiple channels to help you maximize the value of each account holder relationship.

To learn how Harland Clarke can help
your financial institution connect with account holders,
call **1.800.351.3843**, email us at
contactHC@harlandclarke.com
or visit **harlandclarke.com/MysteryShop**.