

Pre-Course Work: Quick Scan of Customer Orientation

	Yes	Somewhat	No
General			
1. Do you know who your members are and how many there are?			
2. Do you listen effectively to all your members, and do you familiarize yourself with their situation?			
3. Do you routinely conduct surveys among your members about your products and services?			
4. Do all employees know about the results of these surveys?			
5. Did you segment your members based on their needs?			
6. Are more than 75% of your members satisfied?			
7. Do you anticipate members' needs?			
8. Do you consider each member a unique partner?			
9. Are complaints addressed within two business days and resolved within a week?			
10. Do you encourage dissatisfied members to notify you of their complaints?			
11. Do you undertake unsolicited additional actions, and do you provide additional unsolicited services to satisfy your members?			
12. Do you have a member help desk?			
13. Do you know the percentage of members who terminate their relationship with your credit union due to dissatisfaction?			
14. Are complaints systematically registered and analyzed in your organization?			
15. Have you established procedures for handling complaints, and are these routinely used in your credit union?			
16. Do you measure the degree of customer loyalty?			
17. Do you regularly advise members about your products/services that best fit their needs?			
18. Do you know what the costs are when you lose a member?			
19. Do you know what the costs are when you gain a member?			

	Yes	Somewhat	No
20. Do you know how much			
21. Do you listen effectively to all your members, and do you familiarize yourself with their situation?			
22. Do you regularly organize meetings with member groups to learn about their needs, wants, ideas and complaints?			
Leadership Style			
23. Is there a commitment to member orientation in top management and Board of Directors?			
24. As CEO, do you know how many complaints are received yearly?			
25. Is management convinced of the importance of satisfied members, and do they act accordingly?			
26. Have you integrated member satisfaction into your organization's vision?			
27. Has the vision been clearly communicated to all your employees and members?			
28. Does management recognize notable trends, and do they anticipate these in a timely manner?			
29. Does management set a good example regarding member-friendly behavior?			
30. Is management open to suggestions and ideas from members?			
31. Does management personally reward those employees who deliver a valuable contribution to increased member satisfaction?			
32. Are relationships between management and members supported and warmly encouraged?			
33. Is management at all times available to members?			
34. Do all managers have regular personal contact with members?			
35. Does member satisfaction also belong to the evaluation criteria of the management?			
36. Are the member's wishes continuously taken into consideration when making decisions?			
37. Does top management also personally handle complaints by members?			

	Yes	Somewhat	No
Strategic Vision			
38. Are there at least 5 member oriented objectives and related performance measures formulated in the corporate, business unit, and team scorecard?			
39. Have all managers formulated at least 3 member related objectives and performance measures in their work plan?			
40. Have you developed technology application strategies for the coming years to increase member satisfaction?			
41. Is the strategy regarding member orientation continuously communicated to all employees?			
42. Do you have partnership relation with all your members based on mutual respect and trust?			
43. Do you guarantee your members a minimal service level and/or complete satisfaction?			
44. Do you continuously benchmark with regard to member satisfaction?			
45. Do you involve your members with the execution of improvement processes?			
46. Are all of your employees involved with the improvement of member orientation?			
47. Do you have guidelines regarding the optimal satisfaction of the member?			
48. Do you consider member information a strategic asset?			
49. Do you have an up-to-date databank in which all member characteristics are registered?			
Internal Processes			
50. Have you appointed			
51. Are products and services delivered within the period expected by the member?			
52. Do your phone, fax, internet, and other e-business tools match the way members prefer to communicate?			
53. Is the phone in your credit union answered within 3 rings in more than 80% of the cases?			
54. Is every process in your credit union arranged in such a way as to optimally comply with member expectations?			
55. Do these expectations form the basis for performance measures?			

	Yes	Somewhat	No
56. Have you implemented a Customer Relationship Management (CRM) system within your credit union?			
57. Do you use measured member satisfaction as an indicator for process improvement?			
58. Do you involve your members in the development of new products and services?			
59. Do you also measure the satisfaction of your internal customers?			
60. Are employees personally responsible for solving member problems?			
61. Do you translate member needs into product and process improvements and the development of new products and services?			
62. Do supporting departments within your organization guarantee the quality of the work they deliver?			
63. Are your marketing employees free to spend what is necessary to correct a mistake made with a member?			
Human Resources			
64. Does member orientation belong to the competence profile of all employees?			
65. Do you give extra rewards to employees who continuously perform in a member-oriented manner?			
66. Do you regularly organize trips to your important members for your employees?			
67. Are your member service employees free to make decisions in order to satisfy members?			
68. Are your employees' interests and the interests of your members related?			
69. Do you encourage your employees to generate ideas regarding the increase of member satisfaction?			
70. Do you have an introductory program in which new employees are also educated concerning the importance of satisfied members?			
71. Is training mandatory for each employee in your credit union?			
72. Are member orientation and continuous improvement criteria for promotion?			
73. Do your marketing employees receive training of at least two weeks each year in customer orientation?			

