

## CREDIT UNION MEMBER SERVICE SURVEY DEVELOPMENTAL REPORT

The DEVELOPMENTAL REPORT *gives feedback to new employees* about their preferred member service style as reported on the Credit Union Member Service Survey.

Most importantly, it gives the employee customized suggestions that are expressed as positive, behavioral action steps to improve personal effectiveness in all three member service areas.

The DEVELOPMENTAL REPORT can be incorporated in training and development programs. It includes explanation and directions for its use, so that it can also be used independently by the new employee. The sample below displays the standard first page of the report:

<b>Credit Union Member Service Survey</b>		
<b>SAMPLE DEVELOPMENTAL REPORT</b>		
Name: SAMPLE	Company: SAMPLE	Location: SAMPLE
Date: SAMPLE		Page: 1

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**The Importance of Member Service:** Loyal members are the life-blood of a financial institution. New members are turned into loyal members by outstanding member service. You were hired because you have strengths that will help you provide outstanding member service. The purpose of this report is to provide you with tools, tips, and techniques that will help you use apply your strengths to the development of outstanding member service habits.

**A Suggested Framework For This Report:** Every member's visit to the credit union has a purpose, and that purpose has a "story" behind it. Learn as much as you can about the member's story, because you are going to play a role in it. You can either be a hero, helping the member solve a problem, fulfill a need, or answer a question, or you may be an obstacle that the member has to overcome. Hero or obstacle, the choice is yours.

**How to Use the Report:**

Use the Rule of Threes to understand and use the information in this report so that you can be your member's hero.

**First Rule of Three: Read this report three times (at least.)** Read first to scan the report and get a general idea of its purpose and content. Read second for content. Study the report, and make a list of the three most important suggestions. Read the third time to highlight important phrases and sentences, and think about how you are going to talk about the report to others.

**Second Rule of Three: Show this report to three people.** Choose three people who have enough experience working with you to have observed you in a variety of work situations, and whom you see as trustworthy and experienced. Ask these people for their feedback about the report, particularly parts of it with which you may disagree. Make an action plan for what you will do to improve member service that you give. Be realistic and precise; for example, say, "I am going to smile at every member," not "I'm going to do better." Begin each workday by reading your action plan.

**Third Rule of Three: Review this report once a month for the next three months.** Focus on suggestions you may have overlooked. Work them into your action plan, revising your plan as needed.

Now, let's look at your results, beginning on the next page. Tools, tips and techniques designed to enhance your ability to provide outstanding member service are included in each of three core areas.

### ***How Is The Credit Union Member Service Survey DEVELOPMENTAL REPORT Scored?***

The DEVELOPMENTAL REPORT is based on a scientific, validated analysis of each individual's answers. The DEVELOPMENTAL REPORT presents useful, practical suggestions for the individual, based on his or her expressed preferences in the three member service areas.

The Credit Union Member Service Survey DEVELOPMENTAL REPORT can be printed on demand from either the scoring or computer-administered licensed software.

***NOTE: For security reasons, we do not post actual sample reports at our public web site. For more specific information about the content of any report, please call our toll-free number: (800) 886-4356 or contact us at [information@helmtest.com](mailto:information@helmtest.com).***