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**CFI GROUP SATISFACTION MEASUREMENT  
PRODUCT PROVIDES ACTIONABLE ROADMAP FOR  
MULTI-CHANNEL FINANCIAL SERVICES INTEGRATION**

***Single, Customer-Driven Metric; Clear Evaluation of Positive and Negative Impacts on Customer Behavior; and Built-In Benchmarking Are Key Features that Provide Critical Management Insights***

*Naples, FL (March 8, 2004)* — A new multi-channel integration solution provides retail banks and mortgage lenders with a vital missing link--a single performance evaluation system for assessing customer interactions across all touch points including web, phone service center, on-site locations, and broker-agents. The new product provides management with a unified view of the complete customer experience and its direct impact on loyalty, retention, and profitability.

CS Channel Manager breaks down each relationship “channel” to identify precisely which experiences best drive satisfaction from the customer perspective. The CS Channel Manager system then identifies the degree to which these experiences positively or negatively influence customer behavior and company revenues—and provides a management road map for maximizing multi-channel customer relationships. CS Channel Manager delivers a comprehensive, system-wide view of the customer experience and yields actionable guidance for maximizing the performance of each channel individually and collectively. CS Channel Manager assesses product and service quality throughout, with performance measures being directly comparable across channels.

“As banks and mortgage brokers continue to streamline and integrate various customer contact points, knowing precisely how each channel is meeting the needs and expectations of the customer is absolutely critical to building retention and loyalty”, said Clayton Wilhite,

CFI Group Managing Partner, “Just as importantly, without the ability to monitor multiple channels in a way that directly compares experiences, you simply can’t assure service consistency across customer segments that may use these channels differently.”

The comprehensive multi-channel solution was developed by CFI Group in partnership with online customer satisfaction management firm ForeSee Results in response to customer demand to have an apples-to-apples means of benchmarking product and service quality across channels. The new system allows managers to get a clear understanding of how online and offline customer touch points can be better aligned to maximize overall customer satisfaction, loyalty, and purchase behaviors. CS Channel Manager leverages CFI Group’s extensive expertise measuring complex customer interactions and ForeSee Result’s leading technology for measuring customer satisfaction on the Web.

The product also includes the capability to benchmark against the overall performance of a wide range of leading U.S. companies. CS Channel Manager uses the sophisticated and scientifically tested methodology of the University of Michigan’s American Customer Satisfaction Index (ACSI). The ACSI benchmark helps identify which aspects of service have the most impact on making or breaking customer loyalty and influencing buying behavior relative to other companies’ performance. The ACSI is the key national measure of customer satisfaction and loyalty, and for over a decade has proven its accuracy as a leading indicator of earnings growth at the company level.

“The online channel has become a vital customer service link for many retail financial organizations” said Larry Freed, President and CEO of ForeSee Results, “Customers increasingly rely on multiple service channels, and it’s now more critical than ever to make sure that the consistency of the customer experience carries from one channel to another. That’s why we have delivered a product that shows, very clearly, not only what works best in each channel but also which combination of service capabilities, across channels, will

orchestrate the optimal performance in ways that impact the bottom line. It's not reliable management practice to try and draw definitive conclusions from reams of raw data coming from different measurement systems. CS Channel Manager yields clear, plain-language analysis and an unambiguous road map for management action."

The new measurement solution is substantially more efficient and precise than the alternative of cobbling together various customer satisfaction measurement products. The combination of a proven and accurate methodology along with a single, integrated evaluation and action plan are seen as pivotal added-value for financial services organizations. CS Channel Manager is available now from CFI Group.

### **About CFI Group**

CFI Group's worldwide consulting practice leverages the company's unique Integrated Customer Asset Management (ICAM) methodology to identify product and service quality improvements that provide the greatest return on investment for its clients. ICAM links customer and employee experiences to operational metrics and financial outcomes, resulting in highly informed decisions about strategy, tactical actions and related resource allocations. CFI Group's patented measurement system serves as the analytical software engine for the American Customer Satisfaction Index (ACSI). Headquartered in Ann Arbor, Michigan, CFI Group has 13 offices worldwide. Its multi-national clients include British Telecom, Microsoft, and UPS. More information on CFI Group can be found at [www.cfgroup.com](http://www.cfgroup.com).

### **About ForeSee Results**

ForeSee Results is the market leader in online customer satisfaction management and converting satisfaction data into user-driven web development strategies. Using the methodology of the University of Michigan's American Customer Satisfaction Index (ACSI), ForeSee Results has developed a model that scientifically quantifies the elements that drive online customer satisfaction and predicts future behaviors such as purchase, return site

visits, or recommend. Companies measured by ForeSee Results include Mellon Financial Corp., SunTrust, Transunion, Mass Mutual, Anthem Blue Cross Blue Shield and Sandy Spring Bank among others. ForeSee Results, a privately held company co-founded by Compuware Corporation and CFI Group, is located in Ann Arbor, Michigan and on the web at [www.ForeSeeResults.com](http://www.ForeSeeResults.com).

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