



Toister Performance Solutions, Inc.

Case Study: Exceeding internal service standards

Project

The real estate lending department at a mid-sized credit union wanted to improve the service they delivered to their branches. Better internal service would allow the credit union to make more loans, reduce processing time, and increase member satisfaction.

Goal: Increase the department's average score on internal mystery shops from 4.52 to 5.5 out of 6.

Actions

1. **Problem Identification.** Met with the credit union's employee development manager to discuss a performance improvement strategy. The meeting revealed that the credit union had just started measuring internal customer service through mystery shoppers, but had not provided its back office employees with any customer service training.
2. **Customer Service Training.** We facilitated our Delivering Next Level Service training program for the real estate lending department. The program was divided into six lunch and learn sessions spread out over six weeks. This gave participants the opportunity to learn one new skill at a time and then immediately apply it in the workplace.
3. **Follow-up Mystery Shops.** The real estate lending department received several mystery shopper reports over the course of the training program so they could see their progress. This also allowed us to discuss their latest results in the classroom.

Results

The real estate lending department increased their average internal mystery shopper score to 5.72 out of 6 by the end of the training program.