

Turn Your Big Data Into Big Insights

Have Sentis Harness the
Power of Your Database

Is this you?



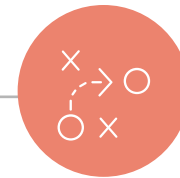
Your databases house a lot of information – profile info, behavioural data and historical/longitudinal info.



You are mining your databases to better understand your customers / members / employees, inform decisions and guide strategic planning

OR

If you are not mining them,
you want to



You have a Business Intelligence or Strategy team that is helping you make sense of all your customer / member / employee data

OR

If you don't have that team,
you wish you had someone to help
you dig in and leverage the value of
all that data



No matter where your CU is at...
You know you could be getting more out of your data or
you have a sense that you're missing something.

We can...



Work with your Customer Experience, Marketing, HR or Business Intelligence team to help identify if your current challenges or questions can be addressed by mining your internal data



Help refine current database queries, activities or projects to achieve better, more action-oriented outcomes



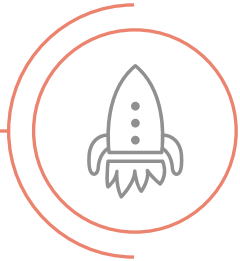
Take on an entire project. Have an initiative or pressing question, but are not sure where to start? Think that perhaps the answers might lie in your databases? Lack the full resources to start &/or finish the project?



Hand Sentis Research the reins and feel confident that you are outsourcing this important initiative to a firm that understands your business and your market



How Does It Work?

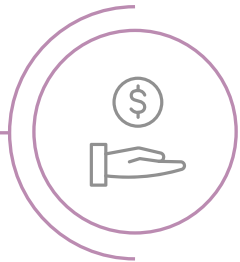


No initiative is too small (or too big!)

Want us to share our feedback and ideas during a planning meeting? We can do that.

Taken things as far as you can and want to see if we can take it further? We can do that.

Want to hand us a challenge and send us away to come up with the solutions? We can do that too!



Our Rates – we offer flexible pricing to fit every budget.



PERSONNEL

Senior Researcher

Research Manager

Data Scientist / Analyst



HOURLY RATE

\$180

\$130

\$130



DAILY RATE

\$1,200

\$900

\$900

Unlike traditional, project-based research, Sentis will charge based on time spent.

This gives you the flexibility to use Sentis as much or as little as needed.

Note: Sentis can provide project-based pricing on request.

CASE STUDY

Targeting Customer Communications



Goal

Identify customers by 'type' so that communications and products can be better tailored



The Challenge

Unsure if the company's existing segments align with how customers actually define themselves



The Question

Is there a better way to segment and target customers?



The Process

- Client provided Sentis with database access
- Sentis linked the survey data with the database to test the accuracy of their approach
- Sentis provided a better system to classify customers
- Sentis also provided:
 - **Insight into how to better communicate with less engaged customers** with the aim of deepening their share of wallet.
 - **General recommendations (functional, service-based and marcomm-based)** to better serve all customers

*Our client was about half-way there before they hit a wall
Sentis took it the rest of the way and more. Budget: \$3,500*

What We Do

Employee Studies



- Employee Engagement
- Culture & Values
- Change Readiness Surveys
- Internal Department Performance
- Employee Workshops
- Financial Literacy Assessment

Consulting & Strategy



- Developing scorecard metrics & targets
- Board consultations & consensus building
- Merger consultation
- Sharing insights and trends across member organizations

Customer Studies



- Customer Experience Surveys
 - Relationship Health
 - Channel & Product Performance
 - Share of Relationship or Product
 - Transaction Follow-up Surveys
 - New Customer Onboarding
 - CU Norms
- Lapsed Customers
 - Closed accounts
 - Non-renewals
- Focus Groups & IDIs
 - Seniors
 - Young adults
 - Busy suburban families
 - Wealth Management
 - Business members
- Spotlight Surveys (Ad Hoc)
 - Life stage analysis
 - Store design
 - Website evaluations
 - Channel usage
 - Voter preferences (mergers)
 - Customer communications
 - Customer segmentation
 - Community Impact

Total Market Studies



- Market Understanding
 - Path to purchase
 - Trade Area Profiling (for mergers)
 - Home, Travel, Auto Insurance
 - How you bank
 - Segments & personas
- Brand Health & Advertising
 - Campaign evaluation
 - Brand positioning & market share
- Product / Concept Testing
 - Account features
 - New insurance products
- BC & Alberta Banking Study
 - FI Benchmarks
 - Market share

How We Do It



- Online surveys
- Telephone surveys
- Focus groups & in-depth interviews
- Mystery shopping audits
- Real-time online reporting
- Workshops and consultations

Want to Learn More?

Never worked with Sentis? We'd love to chat!



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It's been awhile? We like hearing from old friends!

Contact Julie or Mary

Already work with Sentis? Reach out to your Sentis account rep.

They would be happy to provide more info!

