



Using the Member Survey

INSIDE THIS GUIDE:

This guide describes the CBX member survey tool, which lets you compile a list of multiple-choice questions on a variety of topics for your members to answer. The system records and tallies member responses to provide valuable service and marketing information.

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Introduction

The CBX Member Survey tool helps you to focus on knowing your members and creating stronger bonds with these important relationships. Utilize the member survey to help answer questions like:

How satisfied are your members with your current services? What advertising and promotional activities bring the most business to your credit union? If you are planning to offer new services down the road, how many of your members are interested now? What really motivates your members?

Making a Survey Work for Your Credit Union

Why Use a CBX Survey?

Using the CBX Member Survey tool is the best way to create an online record showing members' non-financial preferences. All CBX users, from the front-line teller to credit union managers and leaders, can easily access an individual member's preferences or analyze responses across the entire membership base.

In addition, the CBX survey is made even more powerful for building relationships by combining these known preferences with other data already stored in CBX:

- Cross Sales Tasks and Need Groups
- Master file demographics (age, ZIP code)
- Transaction activities (branch, transaction types)
- Account balance information
- Loan history
- Credit score

Using Query and other CBX tools to mine this information, you can identify members who want/need things and those who qualify.

What Kinds of Questions Should be on the Survey?

One good rule of thumb is **don't ask if you don't plan to act**. The goal of the survey should be to identify what members want you to do, how members want you to act, and how to meet their needs. For example, the question "How do you prefer the credit union to contact you?" helps you contact the member more efficiently. Using that method for future contacts shows you listened to the member's preference and encourages future survey participation.

Although most surveys ask only how happy a member is currently, your CBX survey ought to help you find out what you need to do to make and keep your members satisfied, now and in the future.

Following are some examples of how survey questions can be used to take meaningful action in your credit union:

Example 1: Using a Survey with Cross Sales Need Groups to Identify Sales Potential

Bill Smith has been assigned the responsibility for the credit union's "Convenient Banking Products" need group in its CBX Cross Sales Task tracking system. This group of tasks is designed to encourage members to take advantage of services such as PC Banking, Audio Response, and the like.

Bill takes advantage of the credit union's survey questions, "Why did you join our credit union" and "What banking services are most important to you" to follow up these cross sales tasks with members that have emphasized the importance of convenience and new technology services in selecting a financial institution. In addition, this information helps him get an idea of the types of services people are asking for, what services draw them to the credit union, and what new services people would be receptive to down the road.

Example 2: Creating Telemarketing Leads from Survey Responses

ABC Credit Union is excited about introducing Bill Payment services and believes it will be well received by its membership. To confirm this, the credit union added the question “Would you be interested in home banking bill payment services?” to its general services survey.

Responses are obtained by front-line staff chatting with members as well as through a formal printed survey available in all branch lobbies. The CU creates a Query of the survey response file to show all of the members who have responded positively to this question. This file is used to generate a batch of Telemarketing ticklers, allowing the marketing team to contact these members with the preliminary information about the upcoming bill payment program.

The same file could also be used to selectively insert flyers into member statements for those members who have already expressed an interest.

What are Possible Survey Delivery Methods?

Although volumes have been written on marketing strategies for surveys and instructions on the best way to get participation in a survey, here are some hints for how a credit union can use the CBX Member Survey in normal day-to-day contacts with members. Anything out of the ordinary that comes up, such as a specific compliment or strong complaint, should be communicated using a Tickler, the Telemarketing tracking system, or other appropriate channel.


The Printed Survey	The most common type of formal survey. Questions would be compiled in a high-quality printed document that could be mailed, handed out by tellers and MSRs, or displayed in the lobby for members to take at will. To encourage participation, non-financial incentives could even be offered, such as giving members extra points toward this month’s Tiered Service score or adding to their Lifetime Points total.
The “Formal” Personal Survey	<i>“Do you have a moment to answer a few questions about your borrowing experience with the credit union?”</i> The questions would be read more or less as composed, keeping in mind that the experience should be relaxed and friendly for the member. Always thank the member for his or her time. Here also, a non-financial reward such as additional Lifetime Tiered Service Points can be a helpful incentive. Remember that the member shouldn’t feel like they are taking a test and cannot choose “none of the above.” There may be only a few specific responses that your marketing team needs to track, but members must always be able to respond honestly with their own thoughts.
The “Informal” Conversational Survey	<i>“I hope you are finding our branch hours convenient.” “Thank you for joining the credit union. By the way, how did you hear about us?”</i> Questions are not formally posed, and this informal survey simply provides a way to record things the MSR learns during normal conversations with the member.

Configuring the Member Survey

A Member Survey actually consists of the questions themselves, a list of possible Answers, and the member responses to those questions. Questions can also be organized into Survey Groups to make them easier to manage and administer.

This section describes setting up the questions and answer choices for the Member Survey, including arranging survey questions into Survey Groups.

Tool #513 Member Survey Configuration



Member Survey Configuration


Add Question



Survey Groups

Clear Responses

Jump to question #

Question #	Question
1	How do you like our online banking?

Options... 



This is the main survey configuration screen. From here you can create and modify survey questions, set up answer choices, organize questions into survey groups, and delete member responses already recorded. Listed will be all existing questions, in order by question number. Use the *Jump to question #* field to scroll the list quickly to a specific question number.

- To add a new question, use **Add Question**. The screen shown on page 7 will appear.
- To define Survey Groups, use **Survey Groups**. The screen shown on page 6 will appear.
- To modify an existing question or set up answer codes for an existing question, select the question in the list and use the *Change* option. The screen shown on page 7 will appear.
- To delete an existing question, including all of the answer choices and all existing member responses, select the question in the list and use the *Delete* option. A confirmation screen similar to the one shown on page 7 will appear. Use Enter to confirm deletion or the backup arrow to retain the question/answer and all recorded member responses.
- To view a question and its answer choices without changing anything, select the question in the list and use the *Display* option. A view-only version of the screen shown on page 7 will appear.

- To erase member responses already recorded without deleting the question itself, use **Clear Responses**. See page 9 for details.

Defining Survey Groups

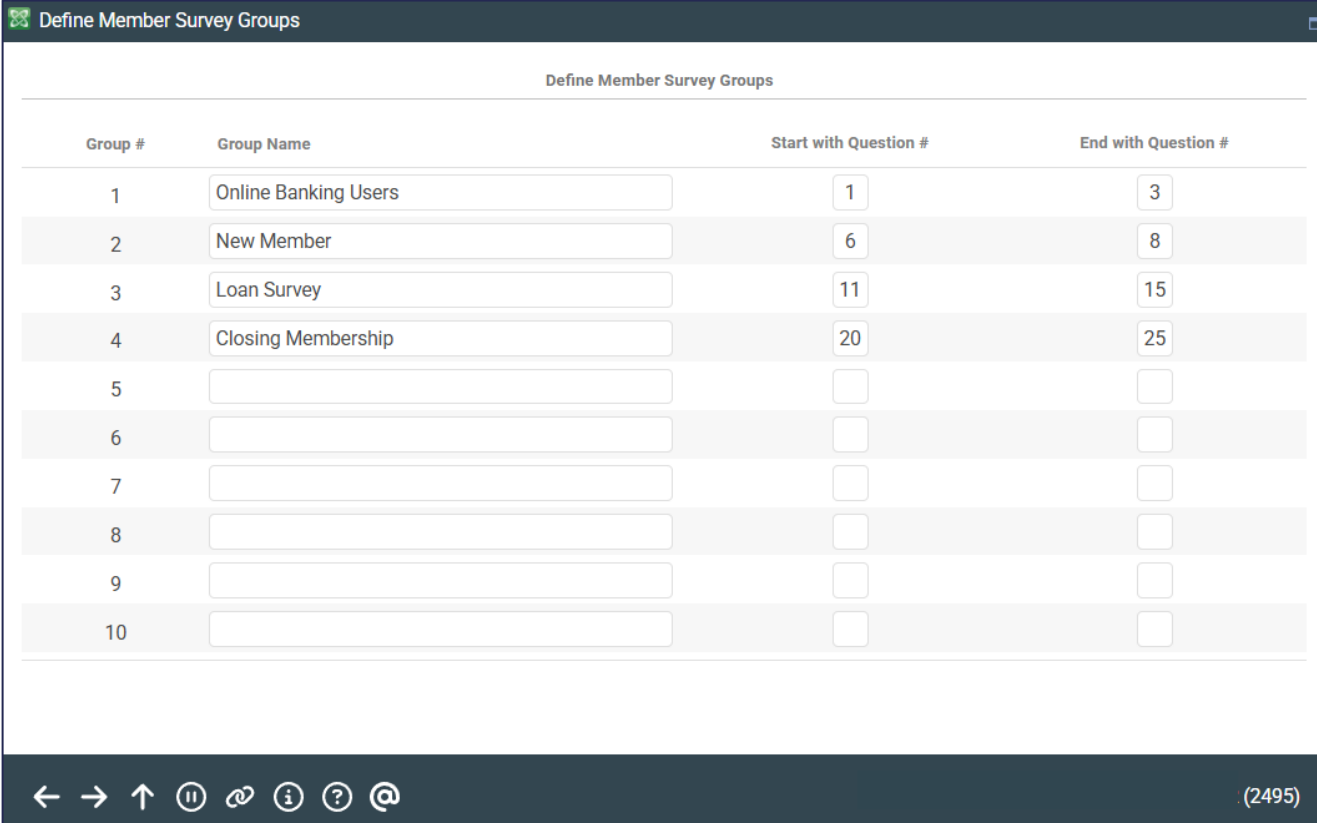
Using Survey Groups helps keep your survey organized and easier to manage and analyze. This feature simply groups sequential questions into logical categories so that related questions can be easily accessed and answered in smaller batches according to credit union needs and marketing strategies.

- *For example, a “New Member” survey group could include five to ten questions designed specifically for new members (why did you join, where did you hear about us, etc.) and used exclusively by member service reps signing up a new member. Another group might be geared toward a loan applicant or new debit card recipient, etc.*

While it is possible to create a survey without grouping the questions, this tool makes managing and analyzing your survey much easier and more effective.

To organize survey groups, use **Survey Groups** on the main survey configuration screen.

Define Member Survey Groups (Tool #513 > Survey Groups)



Group #	Group Name	Start with Question #	End with Question #
1	Online Banking Users	1	3
2	New Member	6	8
3	Loan Survey	11	15
4	Closing Membership	20	25
5			
6			
7			
8			
9			
10			

Use this screen to define up to 10 survey groups. Question numbers from one group to the next do not need to be strictly sequential; however, questions cannot overlap from one group into another.

- **HINT:** To allow for flexibility in maintaining and modifying survey questions, it can be helpful to allow for “extra” survey questions within each group—question numbers that can be used later without having to perform extensive changes on existing groups. For example, in the above sample Group 3 may only use questions 11-15 right now, but question numbers 16-19 are still available for future items should the need arise.

Configuring survey groups can be done at any time, either before or after questions are configured, and even after responses have been recorded. However, question numbers cannot be reorganized into a

different sequence after they are set up (i.e., question 03 can't be changed to be question 25, etc.). Therefore, it is best to have your groupings in mind before entering the questions, so that questions that belong together are entered using a contiguous group of question numbers.

When done, use Enter to record all changes, then use the backup arrow to return to the main survey configuration screen.

Setting Up Survey Questions and Answer Codes

Once survey groups have been defined, the next step is to create the questions themselves, keeping in mind the question numbering sequence used when defining the groups.

- Remember that although survey groups can be defined after all the questions are configured, the groups must consist of contiguously numbered questions. For example, a group cannot contain only questions 1, 2, 6, and 10 but must include a sequential group, such as 1 through 10. Keep this in mind when creating question numbers.

Maintain Survey Question (Tool #513 > Add Question or *Change*)

CBX - Maintain Survey Question

Question # 1

Question

Display

Code	Possible Answers

Options...

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This is the first of two screens used to create or change a question and compile the list of pre-defined responses.

To add a new question, enter a question number (up to 2 digits), a complete *Question*, and an abbreviated *Display* question. (The abbreviated description will be used by various screens and reports when space is limited.) Use Enter to save all changes.

Setting Up Answer Codes


In order for a member's responses to be recorded and tallied, each question on the Member Survey must be configured with a list of possible responses. All survey questions are "multiple choice" type questions; there is no provision for a free-form type of response. Therefore, it is important that the

questions be composed in such a way as to require one of a set of answers, rather than a narrative response.

- **HINT:** Remember that members are individuals! Since they may not always adhere to your list of choices, always allow an “other” answer option that can be used when the response doesn’t match exactly.

To create a new answer code, use **Add Answer**. Or use one of the available options to *Change*, *Delete*, or *Display* existing answer codes. The screen shown below will appear.

Maintain Survey Possible Answers (Tool #513 > Add Question or *Change* > Add Answer or *Change*)

 - Maintain Survey Possible Answers

Code

Answer

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Enter a *Code* (up to 3 alphabetic or numeric characters) and the *Answer* itself. Use Enter to record the change and return to the previous screen.

The following sample shows a question after it has been completed, with an answer list added.

Maintain Survey Question (Tool #513 > Add Question or *Change*)

 CBX - Maintain Survey Question

Question #1

Question

Display

Code	Possible Answers
1	Great
2	Not so hot
3	Couldn't be better
4	Other

Options...

↑

↓

Add Answer

←

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- Notice that responses are listed in alphabetical order by the *Code*. If you want the answers listed in a certain order (such as showing the most common answer at the top), use a numeric code (001, 002, etc.) rather than alphabetic characters.

Clearing Existing Survey Responses

If survey questions have been used for a period of time and you wish to delete all existing responses and “start over” with a new survey session, the **Clear Responses** feature is available on the main survey configuration screen (shown on page 4). This lets you remove the responses made by members without deleting the actual questions themselves.

You may choose to delete just the responses for a single question or responses to all of the questions within a specific survey group. Enter either the question number or survey group and use Enter to clear all member responses.

Clear Existing Member Survey Responses (Tool #513 > Clear Responses)

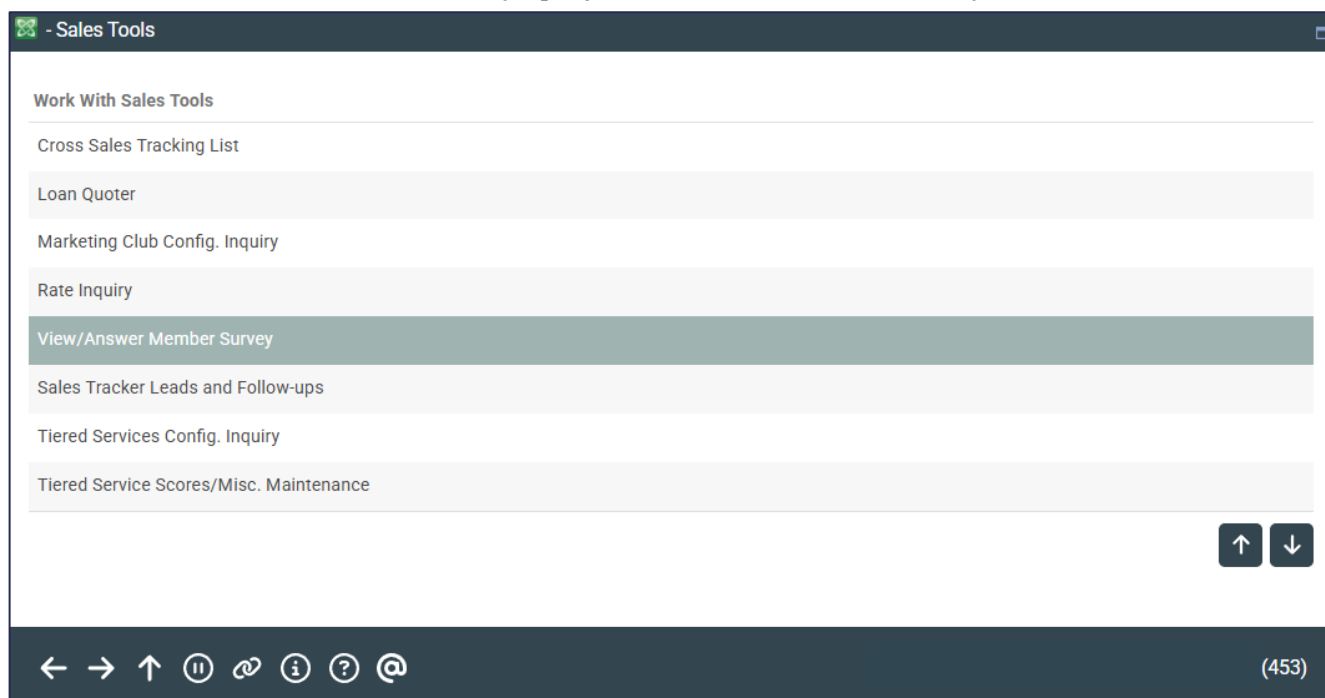
The screenshot shows a web application window titled "Clear Existing Member Survey Responses". Inside the window, there are two radio button options: "Clear all member responses to question #" and "Clear all member responses to survey group", separated by the word "OR". Below these options are two large orange buttons labeled "Clear" and "Skip". At the bottom of the window is a dark blue navigation bar containing several icons (back, forward, up, down, search, etc.) and a count "(2497)" on the right side.

Using the Member Survey

This section describes recording and viewing a member’s responses to Member Survey questions. To make it easy to record responses during contacts with your members, there are many different points in CBX from which the survey can be accessed.

- For front-line staff and member service representatives, use the **Sales Tools** window available in Inquiry, Phone Operator, and Teller Posting. This is great for any time an employee makes contact with a member, whether it be at the teller line, on the phone, or over the member services desk.

Sales Tools (Inquiry, Phone, or Teller > Sales Tools)



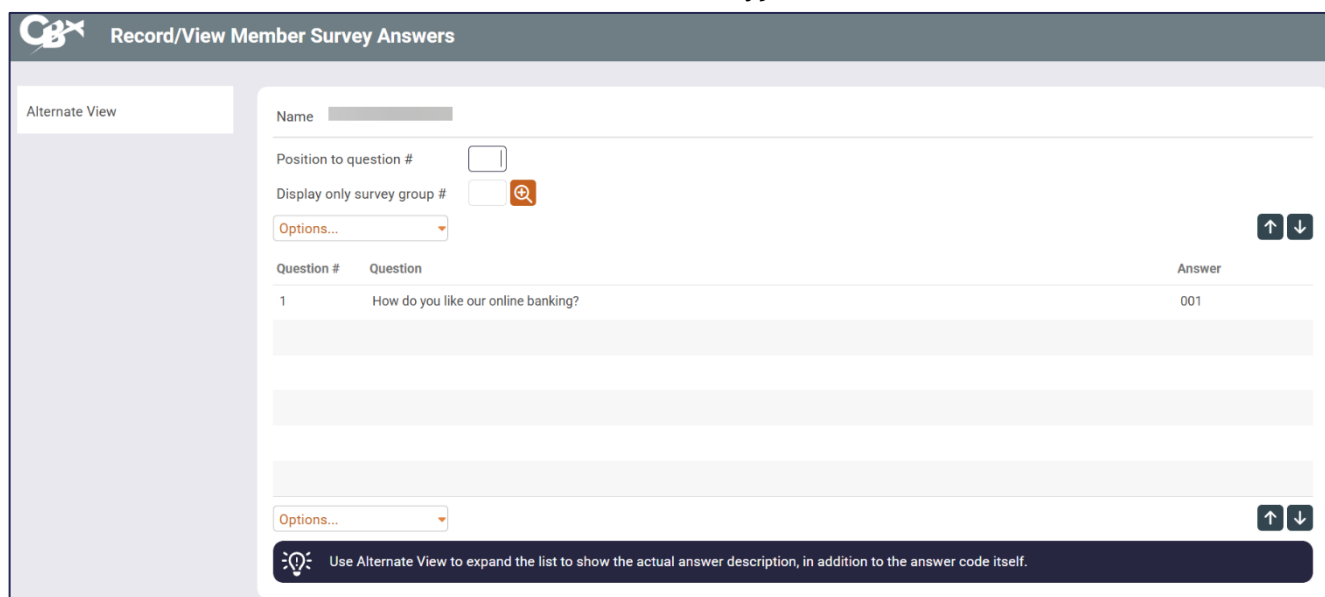
The screenshot shows a web application window titled "- Sales Tools". Inside, there is a section "Work With Sales Tools" containing a list of menu items: "Cross Sales Tracking List", "Loan Quoter", "Marketing Club Config. Inquiry", "Rate Inquiry", "View/Answer Member Survey" (which is highlighted in a darker grey), "Sales Tracker Leads and Follow-ups", "Tiered Services Config. Inquiry", and "Tiered Service Scores/Misc. Maintenance". At the bottom right of this list are two small square buttons with up and down arrows. Below the list is a dark blue navigation bar with several icons (back, forward, up, pause, refresh, info, help, search) and the number "(453)" on the right.

- For marketers and management staff, use **Tool #996 Work With Member Survey Response**. This is a quick way to record responses for many members at the same time, such as for recording answers to a printed survey.

No matter which access point is used, the screen shown below will be displayed first.

Recording and Viewing Survey Responses

Record/View Member Survey Answers (Tool #996 OR Inquiry/Phone/Teller > Sales Tools > View/Answer Member Survey)



The screenshot shows the "Record/View Member Survey Answers" screen. On the left is a sidebar with an "Alternate View" button. The main area has a form with fields for "Name", "Position to question #" (with a dropdown), and "Display only survey group #" (with a checkbox and a gear icon). Below these is an "Options..." dropdown. A table displays survey questions and answers. The first row shows "1" for the question number and "How do you like our online banking?" for the question, with the answer "001". Below the table is another "Options..." dropdown. At the bottom, a dark blue banner with a lightbulb icon contains the text: "Use Alternate View to expand the list to show the actual answer description, in addition to the answer code itself." Navigation arrows are visible on the right side of the form.

Question #	Question	Answer
1	How do you like our online banking?	001


This screen shows all of the questions configured for the member survey, along with any responses already recorded for this member.

Use the fields at the top of the screen to move to a specific question or display only questions that belong to a specific survey group. The Display Only Survey Group option is particularly helpful if your survey is

set up so that only a certain group of questions should be asked by specific employees or in key member contact situations. Clear both fields and use Enter to view all questions.

Use **Alternate View** to expand the list to show the actual answer description, in addition to the answer code itself.


Record/View Member Survey Answers (Alternate View)

**Record/View Member Survey Answers**

Alternate View



Name

Position to question #

Display only survey group # 


Question #	Question	Answer Code	Answer
1	How do you like our online banking?	001	Great
<div></div>			
<div></div>			
<div></div>			

Work with Member Answer



To answer a question or change a previous answer, select the question and use Enter. The screen shown below will appear.

Record Member Survey Answer (Tool #996 or [Inquiry/Phone/Teller > Sales Tools > View/Answer Member Survey] > Work with Member Answer)



**Record Member Survey Answer**

Question # 1Question How do you like our online banking?

Display Standard question

Code	Possible Answers
001	Great
002	Couldn't be better
003	Not so hot
004	Other
<div></div>	
<div></div>	
<div></div>	

Select



This screen is used to choose a response to the question selected on the previous screen. Notice that several choices may be given, depending on how the question was configured.

To select an answer, select the desired answer and use Enter or **Select** to record the response and return to the previous screen. The message “Member Response was added” will appear.

Analyzing Survey Results

Obviously, a member survey does very little good to anyone unless the results are consistently analyzed and used when making key credit union decisions. CBX provides several tools for analyzing responses to your survey questions.

Analysis Report

Tool #512 Member Survey Analysis Report

Member Survey Analysis Report

Report Options

Survey group

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Optional

- Or -

Survey question

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Optional

Copies

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This report not only shows what the member responses were but tallies the answers to show how many members responded and what percentage of members chose each individual answer. If you wish to see responses only for a specific question or all questions within a survey group, enter the question number or group number here. Leave both fields blank to include all questions and responses on the report.

Member Survey Analysis Report (LMSQAR)

6/23/25	ABC CREDIT UNION	LMSQAR	PAGE
11:10:57	Member Survey Analysis Report	User	
As of 6/23/25			
		Answer	-----MEMBER RESPONSES-----
Q#	Question	Code Answer	# of Members % of Total Response

01	How do you like our online banking?	001 Great	5 50.00%
		002 Couldn't be better	2 20.00%
		003 Not so hot	3 30.00%
		004 Other	

			10

Report Builder On-Screen Report

If the analysis report does not meet your needs, a simple display report is also available, displaying all recorded responses to survey questions:

Tool #514 Member Survey Results (MSR/MSA/MSQ)

Select Records

Enter criteria to choose which data should appear on the report.

Combine (And/Or)	Field Name	Comparison	Criteria (Field, #, 'Text', etc.)

Available Fields

Field Name	Text	Length	Decimal
A.MRACTB	ACCOUNT BASE NUMBER	9	0
A.MRQ#	QUESTION NUMBER	2	0
D.MSQDSC	QUESTION	60	
A.MRACD	ANSWER CODE	3	
B.MSADSC	ANSWER DESC	20	

Select

This feature uses the CBX Report Builder to produce a list showing all member responses to your survey questions.

For complete instructions on setting up selection parameters in the Report Builder, please refer to Online Help (by clicking the *i* icon while working in these screens).

This screen is used to specify which records should be included in the report. You may add conditions at this time to further specify the search or simply use Enter to generate a complete list of recorded responses.

Create Your Own Report or Inquiry

If you wish to use Report Builder to create a custom report or inquiry of your survey responses, use the following CBX files (combine with the MASTER file if you wish to see member name or other member details):

- MSR - contains all survey responses recorded for individual members
- MSA - contains descriptions for all configured answer codes
- MSQ - contains descriptions for all configured survey questions
- MSGRP - contains the list of question number ranges used by the survey groups