

Tips for a Successful Member Experience Evaluation

Here are some handy tips and reminders to help you complete a successful MemberShoppers evaluation.

✓ **Wait for your assignment.**

You might not receive an assignment from us every month. Wait until you receive an email from MemberShoppers requesting you to complete an evaluation. To be sure that you receive our emails each month, please add your Client Manager's email address as well as *support@MemberXP.com* to your email safe list.

✓ **Do your homework.**

Review the form for the type of evaluation you are going to do before you begin your evaluation. This will help you know what to look for during your evaluation and what questions to ask.

✓ **Don't reveal that you are a MemberShopper.**

While the credit union employees know that they are participating in this program, they don't know who the evaluators are. Keeping your identity as a MemberShopper evaluator a secret will maintain the integrity of the program.

✓ **Get the employee's name.**

It is very important that you get the name of the credit union employee you are evaluating. If you are unable to get a name, please look for a teller number, initial or name on your receipt. If that is unavailable, please provide a brief description of the employee so that we can identify him/her. *If we cannot accurately identify the credit union employee, you may not receive payment for the evaluation.*

✓ **Let the employee talk to you about the credit union's products and services.**

You are under no obligation to open a new account or sign up for a service you do not want, but credit union employees are trained to identify potential products and services that you don't currently have that could **save you time and money**, so please allow them the opportunity to tell you about it. The tellers are trained to do this quickly, so it only takes a couple of extra minutes. If they don't make the attempt to mention a product or service to you, you can rate them appropriately on the evaluation forms. Please give the employee credit for having mentioned the product or service to you even if you do not accept the offer.

✓ **Fill out the appropriate form online within 24 hours of completing your evaluation.**

The information from the evaluation will still be fresh in your mind as you answer questions, or if we need to get in touch with you for additional information.

✓ **Be professional with your comments.**

When writing comments on your evaluation form, remember to be professional in what you say. Please do your best to use correct grammar and spelling. Please do not identify yourself or leave your name in the comments.

✓ **Keep your evaluation notes for 30 days.**

Please keep your notes from your evaluation for at least 30 days after submitting your report, just in case there is a technical problem with your submission. Jot down the screen confirmation number after you have submitted the evaluation. **If you do not receive a confirmation number, there is a possibility that the evaluation was not successfully submitted.** Contact your Client Manager at their email address or email *support@MemberXP.com* to verify we received it.

✓ **Complete only one evaluation per month.**

The credit union can pay you for just one. There will be occasions when we may ask you to do another one in the month, but we will specifically contact you when that need arises.