



Lake Trust Credit Union
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Gathering Employee Data Across Branches

Formerly NuUnion, Lake Trust Credit Union is a Michigan community-chartered credit union, serving more than 88,000 members in 28 counties. Key Survey makes it easier for them to gather information from their 300 employees who work at 14 different locations.

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Key Survey allows data from people in multiple locations to converge at a single point.

"We started using surveys in an online environment to get feedback, both internally and externally," said Noreen Schafer, Project and Data Management Consultant. "With locations across Michigan, it's difficult to quickly get quantifiable feedback from people. We used to use paper studies; put the survey in a form and enter it. Using an online survey is more efficient."

Multiple deployment options allow for greater flexibility.

NUUNION began using Key Survey in 2003, to gather information across a variety of topics. Some surveys are put on the organization's employee portal, and others are sent to employees through email as a link.

Gather deep, specific information for a single purpose.

"We've used it pretty extensively," said Schafer. "Most recently, we used it to help understand a core data processing change that we have planned for later this year. We entered a lengthy needs analysis survey to help us determine staff training needs."

Or general information for broader knowledge.

Other surveys have been used to gather feedback on employee programs and internal communications - asking employees which internal print communications had the most impact, for example.

NUUNION also uses Key Survey to conduct a member exit poll.

Understand customer needs through exit surveys.

"When a member wants to close their account," Schafer said, "our front line employee will ask them if they're willing to answer a few questions. Some of these questions include - are they leaving because of a better interest rate somewhere else, because of high ATM fees, moving to a different area, etc. Our marketing department uses it to evaluate and understand why members are closing their accounts. Many times during these conversations, our staff has the opportunity to understand our members' needs better and are sometimes able to retain their membership."

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Key Survey is totally customizable.

"What sold us on Key Survey was the functionality on the reporting, being able to fill in Zesults," said Schafer. "That's what we thought was lacking in some other places. Being able to customize the reporting was really key to us."

And very easy to use.

Schafer also liked Key Survey's ease of use: "There was a very short learning curve. In ten minutes you can show a person how to build a survey from start to finish. It's simple to train and user-friendly."

