

# Welcome Home<sup>SM</sup> Tool Kit

We know that loyal customers buy more services, stay with your financial institution longer and recommend you to others. We also know that the early days of the relationship set the tone for future success—or failure. The goal is to make customers feel welcomed, engaged and significant from day one.

That's why Deluxe partnered with financial institutions and experience experts to create the Welcome Home<sup>SM</sup> Tool Kit. This start-to-finish branch solution captures best practices for gaining lasting loyalty among customers by focusing on the first 90 days of the relationship.

*New customer attrition is approximately 30% in the first year. 50% of those accounts are lost in the first 90 days.*

– Harte Hanks Research, 2006

CREATE LOYALTY

- ✕ Provide customers with the kind of relationship they desire from the outset—one that makes them feel welcome, engaged and significant.

*The first 90 days are when customers buy 73% of all their incremental products—so it's the most critical time for securing new customer loyalty and encouraging product use.*

– Harte Hanks Research, 2006

## Your Priorities

- Build business by improving the customer experience
- Deliver customer experiences that match customer desires
- Provide exceptional experiences that improve experiences and loyalty

## Key Benefits

- Improves customer experiences and loyalty
- Helps you retain and grow customer relationships
- Increases referral business because loyal customers tell their friends
- Engages employees by defining their critical role in crafting the customer experience

## How it Works

Each branch purchases a Welcome Home Tool Kit, which includes five critical components. The components cover key elements in the process of helping your customers feel welcomed, engaged and significant every time they visit the branch.

1. **Communication**—Practical materials to help branch champions plan cross-company communications, including a communication guide, communication plan template and assessment for documenting and tracking change.
2. **Education**—Training materials for your organization that allow you to facilitate sessions without support from Deluxe.
3. **Measurement**—Tools to track your success and measure both customer and employee loyalty.
4. **Support**—Materials to ensure the design of your Welcome Home experience is both successful and sustainable. A Deluxe Experience Professional is available to share insight and guidance during implementation.

## NOTES:

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