



PORTFOLIO PERFORMANCE SATISFACTION SURVEY

1. Mike was a good guest, polite, punctual, professional and respectful of the time of the staff.

POOR (1)	(2)	(3)	(4)	AVERAGE (5)	(6)	(7)	(8)	(9)	EXCELLENT (10)
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Comment: We consider Mike a part of our team and look forward to working with him in the future.

2. He was a good listener and asked the "right" questions.

POOR (1)	(2)	(3)	(4)	AVERAGE (5)	(6)	(7)	(8)	(9)	EXCELLENT (10)
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Comment: We had a lot of discussion about the direction we needed to go to increase ROAA and grow our loan portfolio. Mike had several fantastic suggestions and many of these have been put into place and yielding great results!

3. He understood the business needs.

POOR (1)	(2)	(3)	(4)	AVERAGE (5)	(6)	(7)	(8)	(9)	EXCELLENT (10)
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Comment: Mike opened up our eyes to many areas, but was careful not to push us out of our comfort zone.

4. He demonstrated expertise and a genuine commitment in the area(s) of focus.

POOR (1)	(2)	(3)	(4)	AVERAGE (5)	(6)	(7)	(8)	(9)	EXCELLENT (10)
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Comment: Mike encouraged us to consider auto participations. He took us thru every stage of the process, which was extremely easy. He even found our seller and we now have a source and Mike's process to follow next year should we want to purchase another pool.

5. He established actionable, well-thought-out solutions and plans.

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Comment: Mike met with my entire staff to discuss the many initiatives we wanted to implement. He developed a project plan, which was very helpful and kept us on schedule.

6. He provided timely support "after" the consultancy.

POOR (1)	(2)	(3)	(4)	AVERAGE (5)	(6)	(7)	(8)	(9)	EXCELLENT (10)
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Comment: Mike remains very helpful and responsive to anything we might need. He is very quick to return calls and respond to emails.

7. The consultancy was a good value for my investment.

POOR (1)	(2)	(3)	(4)	AVERAGE (5)	(6)	(7)	(8)	(9)	EXCELLENT (10)
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Comment: I am cautious when spending my Member's money, but Mike was certainly worth the investment. In less than 90 days after Mike's visit, our loan portfolio has grown \$3.3 million!

8. Likelihood of recommending Mike to colleagues.

POOR (1)	(2)	(3)	(4)	AVERAGE (5)	(6)	(7)	(8)	(9)	EXCELLENT (10)
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Comment: I will definitely tell my fellow credit union execs about all that Mike has done for us!

9. Additional Comments:

We started implementing some of Mike's suggestions before he left and the results were almost immediate. In our first month after his visit, we grew \$1.2 million. Loan demand is still very strong, my tellers are now cross selling and over the past 90 days, loans have grown \$3.3 million!

10. Information

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