



# Professional Discovery

## Foundation

**Strategic inventory of core loyalty, satisfaction and engagement practices followed by professional recommendations.**

### Program Overview

Starting with interviews of top management, and reviews of current engagement efforts (including policies and programs) our experts will ascertain the intent of your current efforts. Then, we will use Allegiance Pulse survey technology to question both your customers and employees to ascertain quantitative impacts of specific drivers of engagement. We then assess your current engagement program effectiveness and make recommendations for specific plans of action, adjustments, or new programs for improvement. Then we hold a strategic planning workshop designed to empower your key personnel to plan and achieve your new organizational goals based on the most efficient tactics.

### Program Step-by-Step

An implementation consultation kicks off the project. We customize the Pulse products to align with your business units, demographics, and appropriate contact information. Our consultants work with your knowledgeable staff to assure the best alignment to your business structure.

Deployment of the Pulse products requires communication and sampling plans. Based on our recommendations, your database administrators will play an important role in fine tuning the data gathering. Our experienced experts will work with you to optimize deployment to acquire the best possible response.

One-on-one interviews with your staff enrich the quantitative data gathered by Pulse. Through a systematic process of interviews and analysis, Allegiance experts will supplement the hard data from Pulse with the richness of institutional knowledge. A final synthesis of quantitative and qualitative data will provide the support for presentation of the findings.

Our strategic planning workshop delivers actionable results. With our experts, your experts, and your data together in one place, we build a plan of success.

### Program Elements

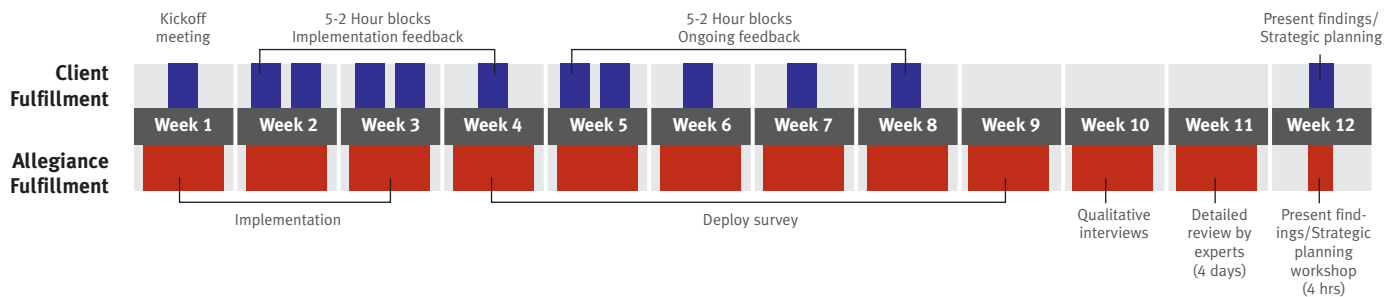
- Execute Pulse survey to customers & employees
- Review of current loyalty/satisfaction efforts, survey/research efforts, and ethics policies/programs
- Interview CEO/HR/Marketing/Legal/Risk Mgmt. – culture, direction, benefits, existing programs, tracking/feedback systems, incentives, turnover, ethics policy, reporting program, existing ethics policy, and existing ethics reporting systems
- Presentation of interview/survey results and benchmarking
- 20/20 analysis elements: respected, accepted, improved, helpful
- Receive recommendations regarding Engagement

### Who Should Use This?

Sr. Management (or evaluating prospect)

### Typical Fulfillment Time

12 weeks



“It is very common for those who are untrained in reading data to assume it points in one direction, when in reality it points in another direction. We work with you to read and interpret your data, draw the right conclusions and create the right action items, and execute a plan that will move the needle for your business.”

– Kyle LaMalfa, Allegiance Best Practices Manager & Loyalty Expert

**For more information visit [www.allegiance.com](http://www.allegiance.com), or contact Allegiance Sales at 801.617.8000.**