

## The Challenge

### How Do You:

- Obtain valuable data directly from your customers and employees?
- Tell customers and employees their opinion matters.
- Clearly understand your customers' and employees' priorities, preferences and needs?
- Achieve the highest response rates?
- Learn customer preferences for new products?
- Have participants share their views with peers?
- Offer a fun and unique meeting experience?

## The Solution

**SurveyMatters** is a live group survey experience powered by the industry's most advanced Audience Response System (ARS) and expertly facilitated by a 28-year industry veteran using a proven methodology. **SurveyMatters** combines the best of live group surveys and focus groups.

**SurveyMatters'** group surveys can be conducted at company events including customer conferences and employee meetings. **SurveyMatters** can also be used to conduct focus groups.

**SurveyMatters** participants enjoy the fun, fast-paced, interactive technology. Participants use credit card sized, radio frequency response cards to submit opinions about preferences, challenges, issues, priorities and new product ideas. The polling software integrates 100 percent with Microsoft PowerPoint. Participants instantly see graphs of the polling results and discuss the responses. Detailed, after-event response polling reports are available for analysis.

## Testimonial

### Scott T. Happ

President & CEO  
Mortgagebot LLC, an Inc. 500 Company

*We engaged First Wellesley to conduct customer polling sessions at our 2006 Partners' Conference because of their cutting edge electronic polling technology, facilitation skills and years of experience in the mortgage industry.*

*First Wellesley professionals delivered exactly what they promised and interacted well with our team during the planning process. Our Partners loved the opportunity to see the views of their peers. I would highly recommend First Wellesley to companies looking for an interactive survey experience that combines advanced technology, fun and valuable information exchange.*

## The Features

<b>Simple</b>	A proven, reliable process led by professionals.
<b>High Impact</b>	Obtain extremely valuable information from customers and employees.
<b>Fun</b>	An instantly engaging experience that holds your attention throughout. It's fast paced, interactive and anonymous.
<b>Customized</b>	Unique polling questions that support your objectives.
<b>Cutting Edge</b>	Radio frequency technology that wows the participants. Integrates 100 percent to Microsoft® PowerPoint®.

## The Benefits

### **SurveyMatters'** clients achieve major benefits:

- Up to one hundred percent response rates.
- A unique and valuable meeting experience with polling, guided discussion and polling reports.
- Customer priorities for new product and product enhancement ideas.
- The ability to capture the most meaningful perspectives, issues and "pain points".
- Greater insight into emerging wants and needs.
- The ability to better execute customer and employee-aligned initiatives.
- Detailed data that augments satisfaction and quality surveys.
- Increased customer and employee recognition.

**SurveyMatters includes:**

- Identification of the **SurveyMatters** session objectives
- Design and testing of customized polling questions
- Facilitation of custom polling sessions, including the use of advanced polling technology and experienced facilitators
- Instant polling result viewing and discussion
- Detailed polling session reporting and analysis

**SurveyMatters Question Types:**

- Yes/No
- Multiple choice (one or more responses)
- Likert scale (rating)
- Ranking
- Paired comparison
- Conditional branching
- Standards
- Comparative link
- Demographic
- Cross reference
- On the fly

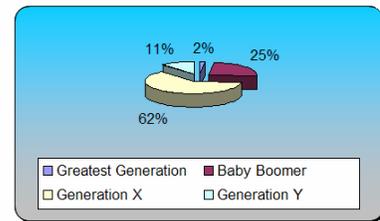
**Potential SurveyMatters Uses**

- Customer conferences
- Employee meetings
- Focus groups
- Employee sales meetings
- User meetings
- New product or corporate advisory groups

**Polling Question Example**

Which age group will produce the highest demand for mortgages in 2010?

	Responses	
Greatest Generation	1	1.89%
Baby Boomer	13	24.53%
Generation X	33	62.26%
Generation Y	6	11.32%
<b>Totals</b>	<b>53</b>	<b>100%</b>



**About First Wellesley**

First Wellesley Consulting is a national professional services firm specializing in the financial services and real estate finance industries. First Wellesley offers consulting, customized polling and leadership education services. Consulting services include strategy, technology and business process reengineering. Clients include Fortune 500, Inc. 500, mid-sized and local firms.

James D. Jones is founder and president of First Wellesley Consulting Group, Inc., located in Wellesley Hills, MA, since 1991 ([www.FirstWellesley.com](http://www.FirstWellesley.com)). Mr. Jones, a 28-year industry veteran, is a nationally recognized speaker and author on industry strategies and trends, best practices and emerging technologies. He is the author of Strategic Planning for Mortgage Lenders.

**Testimonials**

**Daniel Welbaum**  
Sr. Vice President  
Fiserv, a Fortune  
500 Company

*First Wellesley's SurveyMatters™ group polling service, delivered at our 2006 Fiserv Client Conference, was extremely valuable to Fiserv. The advanced polling technology instantly engaged our clients and held their attention throughout the session.*

*Participants were able to instantly register, view and discuss their opinions about industry, best practice and technology issues most important to them. We were able to determine the issues most important to our clients and most relevant to Fiserv. We would recommend SurveyMatters to companies interested in offering high impact and engaging sessions that provide valuable insights about their customers.*

**Kelly Glennon**  
Assistant Vice  
President/Marketing  
Director  
Federal Savings  
Bank

*First Wellesley's SurveyMatters™ is a highly customized program that provided us a great way to find out what our customers really wanted. The information we gathered was fantastic. We began the project with the focus that we wanted to know what products and services most interested our customers. We came out of it learning that information and more. The summary analysis at the project's conclusion was fantastic. I would not hesitate to recommend First Wellesley and SurveyMatters.*

*First Wellesley was very professional and supportive throughout the process. We told Jim what we wanted and he made it happen. It's hard to find someone willing to stay with you throughout the entire process. Jim made it simple – he was always available.*

**FIRST WELLESLEY CONSULTING GROUP, INC.**