

Leading2Leadership LLC

1959 W. Hickory Hollow Lane
Tucson, AZ 85704

Strategy – Marketing – Business Development – Business Intelligence – Sales - Leadership

Discovery Interview Questions

The Discover project is a critical element of this engagement.

Other Business Units (Marketing internal clients)

Each meeting will be by business unit - **45 minutes per meeting:**

1. Consumer Lending
2. Mortgage Lending
3. Commercial Lending
4. Card Services (debit and credit)
5. Branch leadership
6. Remote delivery (Online and Mobile banking)
7. Contact Center
8. Compliance

Sample of Questions:

- Is marketing meeting your business needs?
- If so, where?
- If not, where do you see the need to improve?
- Where can marketing improve?
- Where do you see marketing should evolve to meet future needs?
- What does marketing need from you they are not getting now?
- What do you want to see reported on from marketing?
- What does marketing do well?
- What can marketing do better?

Executives – This will be one meeting with all executives – **90 Minutes**

Sample Questions:

- What do you want to see reported on from Marketing?
- What does the board want to see from Marketing?
- Strategically where does Marketing fit in the organization today?
- Where do you see it fitting in the future?
- Where does marketing fit into the organizations internal communications plan?
- What does Marketing do well?
- Where can Marketing improve?
- What are Marketing's areas of development?
- How will marketing need to change to meet the future needs of the credit union?

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Marketing – Meet with entire Marketing team – 2 hours

The purpose of this meeting is to understand the following:

- What does Marketing do well?
- Where can Marketing improve?
- What does marketing need from the following to do their job better:
 - Executive Leadership
 - Consumer Lending
 - Mortgage Lending
 - Commercial Lending
 - Card Services (debit and credit)
 - Branch leadership
 - Remote delivery (Online and Mobile banking)
 - Contact Center
 - Compliance
- What would Marketing like to do that they cannot do now?
 - Why?
- What skills/expertise does Marketing need to develop or hire to be better?
- What are the organizational perceptions of Marketing's abilities and execution?
 - Is this perception accurate and if so why, if not why?
 - What can Marketing do/learn to change this perception?