

## Ex-Im Broker Experience Survey

The Export-Import Bank (Ex-Im) is surveying brokers to better understand their needs and experiences in order to identify potential service improvements. We expect this survey, which is voluntary, to take approximately 10 minutes to complete. To maintain your anonymity, this survey is being administered by Pacific Consulting Group (PCG), an independent research firm. PCG will present the results to Ex-Im only in aggregate form. No individual names or organizations will be reported. Thank you for your participation!

Please click the  button below to begin.

[INSTRUCTIONS IN BRACKETS ARE FOR THE SURVEY PROGRAMMER]

The first set of questions refers to marketing and training resources that Ex-Im offers to brokers.

1 Do you use Ex-Im’s online training webinars and product fact sheets?

1. Yes [SKIP Q1A AND Q1B]
2. No, we do not use Ex-Im’s training webinars and product fact sheets [GO TO QUESTION 1A, 1B, AND SKIP QUESTION 2]

1a Why don’t you use Ex-Im’s training webinars and product fact sheets? (MARK ALL THAT APPLY)

- We have our own resources for these purposes
- Ex-Im’s materials do not cover the topics we need
- Ex-Im’s materials are biased
- Ex-Im’s materials are not accurate
- The materials are difficult for a new user to understand
- I was not aware of these resources
- Other: \_\_\_\_\_

1b Please describe the ideal marketing and training materials you would like to receive from Ex-Im:  
[OPEN END] [SKIP Q2 IF Q1 IS ‘NO’]

2 How satisfied are you with the following aspects of Ex-Im’s product fact sheets and training activities for brokers:

	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dissatisfied	Very Dissatisfied
Value message conveyed by Ex-Im’s product information	•	•	•	•	•
Accuracy of Ex-Im’s product information	•	•	•	•	•
Availability of learning resources and events (webinars, conferences)	•	•	•	•	•

Topics covered by the training webinars	•	•	•	•	•
Level of detail provided in the training webinars	•	•	•	•	•
Overall satisfaction with Ex-Im training and marketing resources for brokers	•	•	•	•	•

The following questions refer to your experience with the Ex-Im Online – specifically to the IT platform (not to the actions of the underwriter/relationship manager).

3 How satisfied are you with the following features of Ex-Im Online? Consider your own use of Ex-Im Online, and not that of your clients, when responding:

	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dissatisfied	Very Dissatisfied
Allows you to access information and perform tasks online without assistance from Ex-Im staff	•	•	•	•	•
Ease of navigation	•	•	•	•	•
Use of easy-to-understand language	•	•	•	•	•
Ease of submitting a new application (policy, SBCL, amendment, etc.)	•	•	•	•	•
Amount of time it takes to submit an application	•	•	•	•	•
Ease of submitting an application	•	•	•	•	•
Ability to check the status of an application in the system	•	•	•	•	•
Ability to check the status of a claim in the system	•	•	•	•	•
Overall satisfaction with the Ex-Im Online tool	•	•	•	•	•

[IF THE OVERALL SATISFACTION RATING IS 'NEITHER,' 'DISSATISFIED' OR 'VERY DISSATISFIED' GO TO 3A]

3a. You rated your overall satisfaction with Ex-Im Online as [PROVIDE TEXT CORRESPONDING TO RATING PROVIDED BY RESPONDENT: "NEITHER SATISFIED NOR DISSATISFIED," "SOMEWHAT DISSATISFIED," OR "VERY DISSATISFIED"]. Please tell us why you chose this rating.

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The next section refers to interactions with the staff at Ex-Im. This may include regional staff as well as staff in Washington D.C. When answering these questions, please refer to your most recent experiences with Ex-Im.

4 Thinking back to your most recent transactions with Ex-Im’s relationship managers/underwriters, how satisfied were you with their:

	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dissatisfied	Very Dissatisfied
Responsiveness	•	•	•	•	•
Knowledge of Ex-Im processes and policies	•	•	•	•	•
Availability	•	•	•	•	•
Ability to make decisions in a timely manner	•	•	•	•	•
Ability to process transactions in a timely manner	•	•	•	•	•
Willingness to modify policy language to customer needs	•	•	•	•	•
Understanding of my individual business needs	•	•	•	•	•
Understanding the time sensitivity of my customers	•	•	•	•	•
Quality of customer service/account relations (service provided to exporters, not brokers)	•	•	•	•	•
Overall satisfaction with relationship manager/underwriter	•	•	•	•	•

[IF THE OVERALL SATISFACTION RATING IS ‘NEITHER,’ ‘DISSATISFIED’ OR ‘VERY DISSATISFIED’ GO TO 4A]

4a. You rated your overall satisfaction with Ex-Im’s relationship manager/underwriter as [PROVIDE TEXT CORRESPONDING TO RATING PROVIDED BY RESPONDENT: “NEITHER SATISFIED NOR DISSATISFIED,” “SOMEWHAT DISSATISFIED,” OR “VERY DISSATISFIED”]. Please tell us why you chose this rating.

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5 How did your most recent experience with the Ex-Im relationship manager/underwriter compare with your typical experience with an Ex-Im relationship manager/underwriter?

1. Better than most
2. Worse than most
3. About the same as other experiences I’ve had with Ex-Im

The next set of questions refers to broker commission and fees.

6 To what extent do you agree or disagree that the Ex-Im commission structure encourages you to find small business exporters?

1. Strongly agree
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Strongly Disagree

6a. You responded that you [PROVIDE TEXT CORRESPONDING TO RATING PROVIDED BY RESPONDENT: "STRONGLY AGREE," "AGREE," "NEITHER AGREE NOR DISAGREE," "DISAGREE," OR "STRONGLY DISAGREE"] that the Ex-Im commission structure encourages you to find small business exporters. Please tell us why you chose this rating.

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7 How satisfied are you with the following aspects of the Ex-Im Bank?

	Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Dissatisfied	Very Dissatisfied
Range of product offerings	•	•	•	•	•
Consistency of pricing	•	•	•	•	•
Consistency of risk appetite	•	•	•	•	•
Predictability of the decision-making process	•	•	•	•	•
Consistency of processing time	•	•	•	•	•
Dealing with conflict/problem resolution	•	•	•	•	•
Ability to customize policy to meet exporters needs/flexibility of policy wording	•	•	•	•	•
Ease of enrollment	•	•	•	•	•
Ease of amending a policy	•	•	•	•	•
Overall satisfaction with Ex-Im	•	•	•	•	•

[IF THE OVERALL SATISFACTION RATING IS "NEITHER SATISFIED NOR DISSATISFIED," "DISSATISFIED," OR "VERY DISSATISFIED" GO TO 7A]

7a. You rated your overall satisfaction with Ex-Im Bank as [PROVIDE TEXT CORRESPONDING TO RATING PROVIDED BY RESPONDENT: "NEITHER SATISFIED NOR DISSATISFIED," "SOMEWHAT DISSATISFIED," OR "VERY DISSATISFIED"]. Please tell us why you chose this rating.

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On a scale of 1 to 5, 1 being “far less than I expected,” and 5 being “far more than I expected:”

8 Thinking back to your most recent transactions, overall, how much effort did you personally have to put forth in getting the deals done with Ex-Im?

1. Far less than I expected
2. Slightly less than I expected
3. About what I expected
4. Slightly more than I expected
5. Far more than I expected

9 Based on your experience with Ex-Im Bank, what suggestions can you provide to improve the ease of doing business with Ex-Im?

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Finally, we would like to ask a few questions about your work with Ex-Im. These questions refer to you individually and not your firm.

10 How long have you been working with Ex-Im?

1. 1-5 years
2. 6-10 years
3. 11-15 years
4. 16-20 years
5. More than 20 years
6. I have never done business with Ex-Im Bank [THANK AND TERMINATE SURVEY]

11 Approximately how many active policies with Ex-Im do you currently manage (you individually and not your firm)?


1. 100 or more active policies
2. 25-99
3. 10-24
4. 5-9
5. 1-5 active policies
6. No active policies at this time

11a. Why don't you currently have any active policies with Ex-Im? [OPEN END]

12 What percentage of your current book of export credit insurance policies is with Ex-Im (in terms of number of policies)?

1. 75-100%
2. 50-74%
3. 25-49%
4. Less than 24%

Thank you for your participation.

Please click the  button below to submit your survey.

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