



Leadership Insights: Jesse Davis



Thriving businesses require adaptability to remain competitive in a dynamic environment that's impacted by market and economic changes, along with other outside factors. Being adaptive, however, doesn't just mean a *willingness* to change but also the *adeptness* to change and pivot. Proactive market research and forecasting will offer a foundation for your strategic planning and help ensure you keep pivoting and moving ahead toward your growth goals.

Just like you in your business, GreenSky® is constantly improving our program and the features that contribute to your experience and that of your Customers. We make changes regularly to ensure we help you stay competitive with financing offerings and the way you serve your Customers. You will see some recent enhancements to our program highlighted in this issue, and I encourage you to review and build upon your strategic sales approach and Customer experience.

Along with a few other Merchant Portal features that are being highlighted, one that we are particularly excited to introduce is the Plan Change Request, which is now available in the Merchant Portal. You can quickly adapt if your Customer changes their desired loan plan selection, and it typically only requires one business day for a response from GreenSky.

Let's keep staying nimble and growing together!

Jesse Davis

Managing Director – President, Home Improvement
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Here's what You'll Find in this Month's Newsletter:

- Market Watch: 2023 Customer Satisfaction Report
- On the Road Again: Upcoming Opportunities to Meet in Person
- Resources to Help You Get the Most from the GreenSky Program
- Monthly Compliance Message

Market Watch: 2023 Customer Satisfaction Report



Qualified Remodeler Magazine recently published its annual [Customer Satisfaction Report](#). Created in partnership with GuildQuality, a company specializing in Client satisfaction surveying, the report is based on client satisfaction data from thousands of Customers. The goal is to provide home improvement businesses with actionable Customer relations behaviors that can enhance the image of their companies resulting in more referrals, repeat business, and loyal Customers.

The report is presented in two sections. The first part consists of tables that rank business traits (expertise, problem resolution, workmanship, etc.) by their correlation to Customer satisfaction. The data offered is for home improvements in general and several specific types of projects, including exterior remodels, interior remodels, major renovations, and outdoor living.

In the second section, the report offers profiles of more than 80 remodeling and home improvement companies with high levels of Customer satisfaction. In each profile, senior managers provide insights on programs and activities that have delighted their Customers and helped grow their business.

You can [review the report](#) on the Qualified Remodeler Magazine website.

On the Road Again: Upcoming Opportunities to Meet in Person



September 6 – 7, 2023: [GAF West Area Roofer's Expo](#) – Temecula, California
 September 11 – 13, 2023: [The Pinnacle Experience](#) (Pro Remodeler) – Philadelphia, Pennsylvania
 September 11 – 13, 2023: [ServiceTitan Pantheon](#) – Orlando, Florida
 September 23 – 25, 2023: [Western Roofing Expo](#) – Las Vegas, Nevada
 October 3 – 6, 2023: [Service World Expo](#) – Phoenix, Arizona
 October 5, 2023: [CertainPath Partner Jam](#) – Temecula, California
 October 15 – 17, 2023: [Neighborhoodly Reunion](#) – Aurora, Colorado
 October 16 – 18, 2023: [QR Top 500 Live](#) – Las Vegas, Nevada

Monthly Compliance Message

GreenSky® Compliance

Providing a Valid Customer Email Address

Your participation is subject to various program rules and obligations, including, but not limited to, ensuring that your customers are aware of and authorize the submission of any credit application or transaction. Although the Program Agreement and Operating Instructions are available any time, we want to communicate with you regularly about various compliance issues important to your participation.

This month, we are highlighting the importance of providing a valid Customer email address in the loan application process – and why it's never ok to use a Merchant email address as a workaround for Customers who don't have an email address.

As a reminder, it is a violation of the Merchant Program Agreement to enter a Merchant email address in place of a Customer email address on a Customer's application. As part of our application process, it's critical that we collect the Customer's email address to validate the Customer's authorization of the loan and subsequent transactions, as well as to distribute important servicing communications to the Customer. For this reason, under no circumstances can you enter a Merchant email address to authorize the loan or funding transactions. If your Customer does not have an email address, please use noreply@greensky.com, and we will set up alternative arrangements to assist the Customer with the loan authorization process and receive important servicing communications.

Thank you for your continued participation in the GreenSky Program.

An addition note related to Merchant Fees and the Program's prohibition of surcharges:

We would like to remind you that you are prohibited from surcharging your Customers for Merchant Fees. This means you cannot charge Customers who finance with GreenSky more or differently than other Customers, to cover the cost of your Merchant Fees. This is an important protection for our Customers and our Program. We appreciate your commitment to complying with the Program requirements.

As always, if you have questions, please contact your Client Growth Manager or reach us at 1-800-357-1558. We're here to help!

Thank you for partnering with us,

The GreenSky® Team

