

2013 GOLD MONITOR AWARD WINNERS



BANKING

ABOUT CORPORATE INSIGHT

Corporate Insight provides competitive intelligence and user experience research to the nation's leading financial institutions. For over 20 years, the firm has tracked technological developments in the financial services industry, identifying best practices in online banking and investing, online insurance, mobile finance, active trading platforms, social media and other emerging areas. There are no assumptions in Corporate Insight's work – we use live accounts at all of the firms we research, providing our clients with unparalleled, unbiased intelligence on the competition.

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CATEGORY OVERVIEW

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2. Online Applications
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4. Account History
5. Transfer Capabilities
6. Self-Service Options
7. Alert Centers
8. Private Site Help



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ACCOUNT SELECTION TOOLS

PNC earns a Gold Monitor for offering a highly detailed account comparison chart and easy-to-use recommendation tools. The firm offers a three-tabbed comparison chart that provides overview and detailed information of the checking account products offered by PNC within the first two tabs, and houses the checking account recommendation tool in the third. Furthermore, PNC provides an account recommendation tool for the Savings account product offerings that is housed within the Savings overview page.



ONLINE APPLICATIONS

Ally Bank continues to lead the pack, earning its second consecutive Gold Monitor Award, on the strength and simplicity of its multi-step, yet single page account application. The firm utilizes a single-page application with six expandable steps, enabling users to open and customize multiple accounts simultaneously, and fund accounts through a variety of channels, including ACH transfers, wire transfers, mailing a check or uploading a check via the Ally eCheck Deposit tool.



ACCOUNT SUMMARY INFORMATION

After receiving a Silver Monitor last year, Citibank earned a Gold Monitor this year due to the introduction of expandable menus that compact account information nicely on the firm's homepage. One of the highlights of the account information is a lightbox displaying the most recent transactions for each account.



ACCOUNT HISTORY

Bank of America earned a Gold Monitor Award by offering a respectable 12 months of account history that can be sorted and filtered in a variety of ways. The firm also rose in the rankings by improving their transaction descriptions to include processing transactions as well. B of A continues to offer the ability to view supplemental transaction data through expandable entries directly within the transaction table – a helpful feature for interested clients.

Bank of America



TRANSFER CAPABILITIES

Chase earns the Gold Monitor for implementing a secondary navigation to its private site Payments & Transfers section, offering easy access to all of the firm's transfer options. Chase allows clients to transfer funds internally, externally, via a wire and also offers P2P transfer options via the firm's in-house Chase QuickPay tool. Though each of the transfer options are housed within different interfaces, they all feature the same style and design, and the addition of the navigation with flyout menus allows users to easily navigate between transfer tools.



SELF-SERVICE OPTIONS

Citibank returns for the second consecutive year earning a Gold Monitor in this category for its array of Self-Service options organized in a centralized location. Users are able to order statement and check copies to be uploaded to the private site free of charge, as well as update all contact and login information online. Citibank also provides an excellent Forms & Documents section embedded within the dedicated Help Center, a feature that helps the firm earn the top spot on the Monitor podium.



ALERT CENTERS

Capital One, Bank of America and Chase each earned Gold in this category, with all three dominating this category for a fifth consecutive year.

Capital One continues to offer an impressive assortment of account alerts, which can be sent to multiple contact points, including email, SMS messaging and voicemail. The firm also offers an impressive 90 days of alert history, a leader among Bank Monitor firms.

B of A offers a vast selection of alerts for both checking and savings accounts, and includes a set of security alerts that can be delivered to both a primary email address and an additional email or mobile number. The firm also offers an extensive Alert History table, listing alerts from the last 60 days with the option to view a copy of each alert.

Chase offers the greatest variety of checking and savings account alerts that can be sent daily, along with Alerts that are received when specific transactions occur. Additionally, the firm continues to offer a Push notification to a mobile app, in addition to the traditional destinations of email addresses, SMS messaging and voicemail.



Bank of America



CHASE 

PRIVATE SITE HELP

Citibank returns with the Gold Monitor again, offering strong private site help resources, including centrally available Chat and Search tools, contextual section-specific help, and a centralized general Help Center.



CONTACT US



Marina Stein

Senior Analyst – Bank Monitor & Credit Card Monitor

 646-751-6973

 mstein@corporateinsight.com

 [Connect with Marina](#)



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