

# Bank Survey - New Customer

Shopper ID# \_\_\_\_\_

Bank Branch Location

Date and Time Visited \_\_\_\_\_

## PRE-VISIT TELEPHONE CONTACT

Initial Contact:

Male or Female

Did they introduce themselves

What was their name?

Was the phone answered within 3 ring?

Was the staffer pleasant?

Did they actively listen and respond appropriately?

Were they focused on the conversation?

Were you thanked at the end of the conversation?

## BRANCH VISIT - FACILITIES

Was parking lot clean?

Were doors clean?

Was parking lot in good repair?

Were doors unlocked?

Were windows clean?

Were walls/ceilings clean?

Was interior clean and dust free?

Did the bank look neat and organized?

## BRANCH VISIT - FACILITIES

Employee Name

If name is not known or displayed then a description

Bank Employee Male/Female

Age

Hair Color

Height

Did they use your name in a conversation

Did they greet you warmly and with a smile?

Were they knowledgeable and confident when you asked questions?

Did they offer at least two options to help you?

Did they successfully answer any objections you had to banking ?

If you were looking for a new bank would you bank here?

Comments