

ABC BANK

LOBBY TELLER SURVEY

OFFICE LOCATION: _____ DEPT: _____ DATE: _____
SHOPPER CODE: _____ TIME OF DAY OF YOUR VISIT: _____
YOUR TRANSACTION: _____
EMPLOYEE WHO ASSISTED YOU: _____
TELLER NUMBER: _____

POSSIBLE POINTS: 20 SCORE: ____/20 ____%

1 = YES 0 = NO N/A = NOT APPLICABLE

COURTESY/CUSTOMER RELATIONS:

- _____ 1. AS YOU ARRIVED AT THE WINDOW AREA, WERE YOU QUICKLY ACKNOWLEDGED BY AN EMPLOYEE?
- _____ 2. ONCE THE TELLER WAS DONE WITH ANY PRIOR CUSTOMERS, WERE YOU WAITED ON WITHOUT HESITATION OR DELAY?
- _____ 3. DID THE TELLER GREET YOU WITH A POLITE GREETING, MAKING YOU FEEL WELCOME?
- _____ 4. WAS YOUR TRANSACTION HANDLED COURTEOUSLY?

COMPETENCY/PRODUCT KNOWLEDGE:

- _____ 5. WAS THE TELLER'S NAME DISPLAYED? (NAME TAG, PLATE OR BUSINESS CARD)?
- _____ 6. DID THE TELLER COMPETENTLY AND ACCURATELY HANDLE YOUR TRANSACTION?
- _____ 7. DID THE TELLER FOCUS FULL ATTENTION ON YOU THROUGHOUT THE ENTIRE TRANSACTION?

CONCERN/SALES:

- _____ 8. DID THE TELLER MENTION/CROSS-SELL OTHER BANK SERVICES, DISCOUNTS OR PRODUCTS YOU DID NOT ASK ABOUT? IF YES, LIST WHAT WAS MENTIONED:

- _____ 9. DID THE TELLER ASK AND/OR USE YOUR NAME DURING THE TRANSACTION?
- _____ 10. DID THE TELLER MAKE AN APPROPRIATE CLOSING COMMENT?
(SAY ONE NICE THING: i.e. "Have a nice day", "Come back and see us", etc.)

_____ **ON A SCALE OF 0-5, RATE YOUR OVERALL CUSTOMER SERVICE EXPERIENCE DURING THIS VISIT. TERRIBLE - 0 1 2 3 4 5 - EXCELLENT**

FIRST IMPRESSIONS:

- _____ 11. WAS THE PARKING LOT AND EXTERIOR OF THE BUILDING CLEAN AND WELL-KEPT?
COMMENTS ON BANK EXTERIOR: _____
- _____ 12. WAS THE INTERIOR OF THE BANK CLEAN AND WELL-KEPT?
COMMENTS ON BANK INTERIOR: _____
- _____ 13. AS YOU ENTERED THE BANK, DID AN EMPLOYEE GREET YOU? (Before reaching the person helping you)
IF YES, EXPLAIN: _____
- _____ 14. DID EMPLOYEES PRESENT A NEAT AND CLEAN PERSONAL APPEARANCE?
- _____ 15. DID EMPLOYEES GIVE YOU THE IMPRESSION THEY WERE INTERESTED IN HELPING YOU?

OTHER EXPLANATIONS/COMMENTS:

