

**ABC BANK**  
**TELEPHONE SURVEY (BRANCH OFFICES)**

OFFICE LOCATION: \_\_\_\_\_ DEPT: \_\_\_\_\_ DATE: \_\_\_\_\_  
SHOPPER CODE: \_\_\_\_\_ TIME OF DAY YOU CALLED: \_\_\_\_\_  
YOUR SCENARIO: \_\_\_\_\_  
EMPLOYEE WHO ASSISTED YOU: \_\_\_\_\_

**POSSIBLE POINTS: 20      SCORE: \_\_\_\_/20      %**

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

**COURTESY/CUSTOMER RELATIONS:**

- \_\_\_\_\_ 1. DID THE BANKER ANSWER YOUR CALL BY THE THIRD RING?
- \_\_\_\_\_ 2. DID THE EMPLOYEE CLEARLY IDENTIFY HIMSELF/HERSELF? (NOT THE OPERATOR)
- \_\_\_\_\_ 3. DID THE EMPLOYEE ANSWER WITH A WARM GREETING AND PLEASANT TONE?
- \_\_\_\_\_ 4. DID THE EMPLOYEE ASK YOUR NAME?

**COMPETENCY/PRODUCT KNOWLEDGE:**

- \_\_\_\_\_ 5. DID THE EMPLOYEE FILL THE INITIAL REQUEST OR TRANSFER YOU TO THE APPROPRIATE PERSON IN A SATISFACTORY MANNER?
- \_\_\_\_\_ 6. WERE YOUR QUESTIONS ANSWERED SATISFACTORYLY?

**CONCERN/SALES:**

- \_\_\_\_\_ 7. DID THE EMPLOYEE USE YOUR NAME DURING THE CONVERSATION?
- \_\_\_\_\_ 8. DID THE EMPLOYEE ATTEMPT TO CROSS-SELL OTHER BANK SERVICES, DISCOUNTS OR PRODUCTS YOU DID NOT ASK ABOUT?  
IF YES, LIST WHAT WAS MENTIONED: \_\_\_\_\_
- \_\_\_\_\_ 9. WERE YOU ENCOURAGED TO COME IN OR TO CALL BACK?
- \_\_\_\_\_ 10. DID THE EMPLOYEE PROVIDE A POLITE CLOSING COMMENT AND/OR THANK YOU?

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

**FIRST IMPRESSIONS:**

- \_\_\_\_\_ 11. DID THE OPERATOR/FIRST PERSON ANSWER YOUR CALL BY THE THIRD RING?  
# OF RINGS: \_\_\_\_\_
- \_\_\_\_\_ 12. WAS THE INITIAL GREETING WARM AND PROFESSIONAL?  
GREETING: \_\_\_\_\_  
NAME OF PERSON WHO INITIALLY ANSWERED YOUR CALL: \_\_\_\_\_
- \_\_\_\_\_ 13. DID THIS PERSON TRANSFER YOU TO THE PROPER PERSON/AREA?
- \_\_\_\_\_ 14. WAS THE TRANSFER DONE POLITELY AND EFFICIENTLY?
- \_\_\_\_\_ 15. WERE YOU ON HOLD LESS THAN 30 SECONDS FOR THE TRANSFER?  
HOW LONG WERE YOU ON HOLD DURING THE TRANSFER? \_\_\_\_\_

OTHER EXPLANATIONS/COMMENTS:

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