

# ALPINE BANK

## WEB CHAT

# INSTRUCTIONS

## QUESTIONNAIRE

Initiate a live chat on the Alpine Bank website, and discuss a specific product or service with an Alpine Bank digital channel representative to ensure they are connecting with customers, asking needs-based questions, and recommending solutions to help customers meet their needs.

### Before You Begin

- Review your shop confirmation
- Know your scenario (what to ask)
- Have a distraction-free environment

### Don't Forget!

- Have a live chat conversation
- Get the name of the employee
- Get a chat transcript as proof of shop



## General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Complete the shop during live chat business hours: Monday–Friday from 7:30 AM–9:00 PM MST.
- Check your shop confirmation for the scenario you are required to present.
  - Present your scenario based on you alone (do not ask about joint accounts or accounts for family members).
- Have a device available that can record the wait to be assisted (in minutes:seconds).
- Request a chat transcript to be emailed to you. Copy and paste the text of the chat conversation into your report as proof of shop.
- Submit your report to [shopperhub.cxgroup.com](https://shopperhub.cxgroup.com) within 12 hours of completing the shop.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot currently nor have ever worked for Alpine Bank.



## Shop Instructions

- Go to [www.alpinebank.com](https://www.alpinebank.com) using a computer or the web browser of a mobile device.
- Click the Live Chat icon on the right side of the homepage to open a live chat with an employee.
  - If you cannot access live chat during business hours, try again using a different device/web browser.
  - If you have made three attempts to access live chat and cannot get through, contact your scheduler.
- Time how long it takes to be assisted (minutes:seconds) from the time you initiate the live chat.
- Present the scenario as listed in your shop confirmation.

- Let the employee take the lead in the conversation.
- Respond to any questions you are asked as if you are someone who is interested in the particular product you are requesting.
- Get the name of the employee. If not mentioned by the end of the chat, ask for their name.
- At the end of the conversation, thank the employee for the information to politely end the chat.
- Do not open an account. Indicate that you will visit a branch in person or open an account online if you decide to move forward.
- **Important!** Before you close the chat window, request to receive a chat transcript by email. You will be required to copy and paste the full text of the chat conversation into your report.
  - Click on the "+" in the Chat Bar.
  - Click on "Email Transcript."
  - Input a valid email address where the transcript should be sent.
  - Once the chat has ended, the transcript will be emailed to the entered email address.
  - Check your junk mail folder if you do not receive the email.



# QUESTIONNAIRE

Shop date:

Start time:

End time:

## Visit Information

1. Employee name:

2. How long did you wait to be assisted?

*Start timing once you click to initiate the live chat, and stop timing once an employee is available to assist you.*

1 minute or less

3:01 – 4 minutes

1:01 – 2 minutes

4:01 – 5 minutes

2:01 – 3 minutes

More than 5 minutes

## Connect

3. Did the employee have a positive attitude and greet you in a friendly manner to build rapport?

Yes

No

4. Did the employee use a request to serve statement?

*This is any question or statement indicating the employee is ready to assist you, such as "How may I help you?", "I can help you", etc.*

Yes

No

5. Did the employee handle your interaction in a professional manner?

Yes

No

## Ask

6. Did the employee ask needs-based questions to understand your needs?

*This includes questions such as: Do you have accounts with Alpine Bank currently? Are you interested in a checking or savings account? How often do you need access to your funds? What is your average balance? How many checks do you normally write? What do you look for in a banking relationship? What are your savings goals? What did you like/dislike most about your previous bank? Do you have a smartphone? Have you used online banking/mobile banking previously?*

Yes

No

7. List all questions that were asked to assess your needs, or explain what occurred if questions were not asked:

- *If Yes, enter the verbatim questions you were asked.*
- *If No, provide commentary to explain what the employee said or did instead after you made your inquiry.*

8. Did the employee listen to you in order to understand and respond to your inquiry?

Yes

No

## Recommend

9. Did the employee describe the features of the product or service in a way that you could understand?

*Features are any factual statements made about the product or service. For example, telling you the required minimum balance, maintenance fee charge, interest bearing, payment terms, payment timeframe, etc.*

Yes

No

10. Explain all features that were mentioned, or explain what occurred if features were not mentioned:

- *If Yes, enter specifically what the employee said about product/service features.*
- *If No, provide at least one sentence of commentary to support your response.*

11. Did the employee mention any benefits of the product or service when discussing it?

*Benefits are statements about how the product or service could help you as a customer. For example, easy access to funds, unlimited check writing, a lower fee, not having to worry about keeping a minimum balance, commenting that using a product or service saves time or saves money or is "easy", "quick", "convenient", etc.*

Yes

No

12. Explain all benefits that were mentioned, or explain what occurred if benefits were not mentioned:

- *If Yes, enter specifically what the employee said about product/service benefits.*
- *If No, provide at least one sentence of commentary to support your response.*

13. Did the employee recommend any other products or services?

Yes

No

14. If yes, list all other products and services that were recommended:

## Exceed

15. If additional information was needed, did the employee refer you to another employee or department in a friendly and courteous manner?

Yes

N/A – referral not needed

No

16. Were the employee's responses received within a reasonable period of time?

Yes

No

17. Did the employee's responses include proper spelling and correct grammar?

*If there were only a few minor errors or typos, answer Yes. Only answer No if the errors caused confusion or frustration or if the employee got your name completely wrong.*

Yes

No

18. Did the employee ask for your business?

*For example, did the employee let you know you could open an account online or in a branch?*

Yes

No

19. Explain how the employee asked you to activate a product or service, or explain what occurred if the employee did not ask for your business:

- *If Yes, explain exactly what the employee said or did when asking to activate a product or service for you.*
- *If No, explain how the conversation ended.*

20. Did the employee thank you for your inquiry?

Yes

No

21. Did the employee use your name at least once during the conversation?

Yes

No

22. Based on your interaction with the employee, on a scale from 0 - 10, how likely would you be to recommend Alpine Bank to a family member, colleague, or friend?

*0 = Extremely unlikely; 10 = Extremely likely*

0

6

1

7

2

8

3

9

4

10

5

23. Explain your rating:

*If your rating is 10, explain why you would recommend. If your rating is lower than 10, comment on what the employee could have said or done to improve the interaction.*

24. Overall comments:

*Describe your overall impressions of the web chat and your interaction with the employee in detail, including the questions you asked, how your questions were answered, and any information provided about the products and services.*

25. Text transcript of chat conversation:

*Copy and paste the full text of the conversation from the emailed transcript.*

END OF QUESTIONNAIRE