

# COMPETITOR BANK

## WEBSITE IN ENGLISH

# INSTRUCTIONS

## QUESTIONNAIRE

Use the assigned bank's website to make sure it's functional, attractive, easy to use, and easy to navigate, and then submit a contact form through the website, waiting up to 2 business days to receive a response from the bank's customer service department.

### Before You Begin

- Review your shop confirmation
- Have a copy of the questionnaire
- Have a distraction-free environment

### Don't Forget!

- Evaluate all required website areas
- Submit contact form and wait for reply
- Take screenshots as proof of shop



## General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
  - Have a copy with you as you complete the shop to be sure you complete all elements.
- Check your shop confirmation for the bank website you are required to evaluate.
- Spend a minimum of 5-10 minutes using the website.
- Take 4 or more screenshots of the website to upload with your report as proof of shop.
  - One image must show the question you asked via the 'Contact Us' form.
  - Remaining images should show any of the various pages visited while using the website.
  - Black out any sensitive personal information in the images prior to uploading them.
- Wait 2 business days to receive a response to the question you asked via the contact form.
  - Take a readable screenshot of the response you received to upload with your report.
- Submit your report to [shopperhub.cxgroup.com](https://shopperhub.cxgroup.com) after you have received a response to your question (or after 2 business days have passed with no response, whichever comes first).
  - Business days are Monday-Friday. For example, if you complete your shop on a Saturday, you must wait until that same time on Tuesday before you can submit your report indicating that no response was received.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot currently nor have ever worked for the assigned bank.



## Shop Instructions

### Step #1: Spend some time using the website to evaluate functionality and ease of use

- Using a computer or the web browser of a mobile device, go to the assigned bank's website using the link found in your shop confirmation.
- Click the links in the bank's website header to see if each one is working correctly.
- Click back and forth between pages to check that navigation is working well and that you're able to move through the site with ease.
  - If you receive an error message while navigating between links, take a screenshot of the error message (if possible) to upload with your report.
- Look for information on various products and services to assess how easy it is to locate that.

### Step #2: Use the 'Contact Us' form to submit an inquiry to their customer service department

- Look for a way to contact the bank by email or using a contact form (e.g., look for a 'Contact Us' link). Note that the location and wording of this link may vary.
- Submit one of the following questions using the contact form:
  1. "I'm interested in a checking account. What can you tell me about those options?"
  2. "I'm interested in a savings account. What can you tell me about those options?"
  3. "How do I enroll in mobile banking?"
  4. "How do I enroll in online banking?"
  5. "What can you tell me about your debit cards?"
  6. "What can you tell me about your credit cards?"
  7. "How many ATMs do you have in your network, and where can I find a map of those?"
- Enter a valid email address where you can receive a response (do not enter a phone number).
- **Important!** Before you click to submit the contact form, take a screenshot of the bottom half of the form showing the question you asked. Upload this image with your report.

### Step #3: Wait for the bank to respond to your inquiry before you submit your report

- Wait 2 business days (48 hours) to receive a response to your question.
- Submit your report once you have received a response to your question or after 2 business days have passed with no response (whichever comes first). Check your junk email folder before submitting.
- Take a screenshot of the response you received to upload with your report. Make sure the reply text is readable in your image.
- NOTE: If you were unable to locate a way to contact the bank's customer service by email or contact form, submit your report immediately after completing the required website observations. Include a detailed summary of your attempts to locate this feature and what you found instead.



# QUESTIONNAIRE

Shop date:

Start time:

End time:

## Service Analysis

1. Was the website accessible on your first visit attempt?

Yes

No

2. If no, please explain:

3. Was the website easy to navigate with information clearly defined?

Yes

No

4. If no, please explain:

5. Was the website user-friendly?

Yes

No

6. If no, please explain:

7. Were all links operable?

Yes

No

8. If no, explain which link(s) did not work, and upload a screenshot of the error message, if possible:

9. Was it easy to move back and forth between pages using the links on the website?

Yes

No

10. If no, please explain:

11. Was information about bank products and services readily available on the website?

Yes

No

12. If no, please explain:

13. Were supplementary information requests easy to complete?

*This refers to how easy you felt it was to complete the online 'Contact Us' form. If no response was received within 2 business days, select No. Upload screenshots showing the question you asked AND the response you received. If unable to locate a 'Contact Us' feature that allowed you to contact the bank by email, please explain in your overall comments.*

Yes

Contact Us option not located

No

14. If no, please explain:

15. Was the overall appearance of the website attractive and representative of the financial institution's image?

Yes

No

16. If no, please explain:

17. Based on your experience with the bank's website, on a scale from 0 - 10, how likely would you be to recommend this 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

18. Explain your rating:

*If your rating is 10, explain why you would recommend. If your rating is lower than 10, comment on how your experience could have been improved.*

19. Overall comments:

*Describe your overall impressions of the website in detail. If you were unable to locate a way to contact the bank's customer service by email, please explain in detail where you looked for this on the website and what you found instead.*

20. Upload additional screenshots showing your website evaluation as proof of shop:

END OF QUESTIONNAIRE