

CITY NATIONAL BANK

PHONE

INSTRUCTIONS

QUESTIONNAIRE

Call the branch to speak with a bank representative to ensure they are building rapport with customers, identifying needs, and recommending appropriate solutions over the phone.



Before You Begin

- Review your shop confirmation
- Confirm business hours
- Have a distraction-free environment



Don't Forget!

- Call during business hours
- Follow your scenario
- Get the name of the representative



General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Call the assigned branch during business hours. Check bankatcity.com for your assigned location's business hours prior to your shop.
 - Avoid calling within an hour of closing to allow plenty of time for your conversation.
- Tell the representative you're new to the area and looking to change banks to see what they may offer new customers.
 - If asked, be prepared to identify a bank other than City National as your current bank.
- Do not give your real name or provide any personal information (account numbers, SSNs, etc.) during the call so that you may continue to participate in the project.
 - If you would like to sign up for multiple call shops, using a different name during each call will help keep your identity anonymous.
- Submit your report to shopperhub.cxgroup.com within 12 hours of completing the call.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot have ever worked for City National Bank.



Shop Instructions

- Dial the branch phone number found in your shop confirmation, and follow the prompts.
 - If you receive a recording/voicemail, a representative asks if someone can call you back, the call is disconnected, or you get a busy signal, hang up and call back later the same day during business hours.
 - If you have attempted to call three times during business hours and cannot get through to someone to complete your assignment, contact your scheduler.

- Listen to the greeting when the call is answered by a representative. Did they state:
 - Their name?
 - The bank name (City National)?
 - The branch name/location?
- Tell the representative you are new to the area and looking for a new bank. Ask the representative to tell you what they offer regarding new accounts for new customers.
 - Let the representative take the lead in the conversation.
 - Respond to any questions you are asked as if you are someone who is interested in moving your accounts to City National Bank.
 - Do not mention your name until the representative asks for it.
 - Do not use your real name or provide personal information (account numbers, SSNs, etc.).
- Get the name of the representative. If not mentioned by the end of the call, ask for their name.
- Do not open an account over the phone. Indicate that you will visit a branch in person or open an account online if you decide to move forward.



QUESTIONNAIRE

Shop date:

Start time:

End time:

Phone

1. Did the representative who initially answered your call state the bank name in the greeting?
☐ Yes ☐ No
2. Did the representative who initially answered your call state the branch/location name in the greeting?
☐ Yes ☐ No
3. Did the representative who initially answered your call state their name in the greeting?
☐ Yes ☐ No
4. Name of representative who answered the call, if different from primary representative:
Enter N/A if the same representative who provided a response to your inquiry also answered the call.
5. If transferred, did the representative ask permission to transfer the call or inform you the call would be transferred?
☐ Yes ☐ N/A – not transferred
☐ No
6. If transferred, were you provided with the name of the person to whom the call would be transferred?
☐ Yes ☐ N/A – not transferred
☐ No
7. If transferred, did the person to whom you were transferred know your name AND the purpose of your call without you having to repeat it?
☐ Yes ☐ N/A – not transferred
☐ No
8. Primary representative's name:
This is the representative who provided a response to your inquiry.
9. Did the primary representative voluntarily introduce himself or herself by name at the beginning of the interaction?
☐ Yes ☐ No
10. Did at least one of the representative(s) ask for your name at any time during the phone call?
☐ Yes ☐ No
11. Did the primary representative use your name during the conversation?

☐ Yes☐ No

12. If the primary representative used your name, how many times was your name used during the interaction?

Enter a number.

13. Did the representative make you feel like he or she was glad you called the bank today?

☐ Yes☐ No

14. Explain what the representative said or did to make you feel this way:

15. Did the representative ask questions to clarify your needs?

For example, how you pay for routine purchases or bills, if you receive a direct deposit, how you track balances, typical account balances, current savings accounts or goals, what you do for a living, etc.

☐ Yes☐ No

16. Did the representative make a recommendation based on your conversation?

☐ Yes☐ No

17. Did the representative ask about any purchases or expenses you might have OR position City National Bank's capabilities to help with these?

This could include questions about or a willingness to help with significant expenses (home purchases, projects, refinancing, vehicle purchases, tuition costs, or other major expenses).

☐ Yes☐ No

18. Which questions did the representative ask about potential purchases or expenses?

Select all that apply.

☐ Will you be purchasing or refinancing a home?

☐ Are you thinking about purchasing a vehicle in the near future?

☐ Are you thinking about any significant home projects?

☐ Other

☐ Would your family have any tuition expenses currently or in the near future?

☐ None

19. If other, list the question(s):

20. Did the representative express an interest in helping you move forward with the account(s)?

This would include offering to open the account, discussing next steps, asking for your contact information for follow-up, or anything that indicates the representative would like to help you get started.

☐ Yes☐ No

21. Did the representative remain upbeat and professional during the call?

☐ Yes☐ No

22. Did the representative offer any additional assistance?

For example; Anything else I can help you with?, What else can I do for you?, What else can I help you with?, Is there anything else I can do for you?, Anything else today?, etc.

☐ Yes☐ No

23. Did the representative thank you at the end of the call?

The representative should make some statement of appreciation for your call by saying thanks, thank you, appreciate the call, etc.

☐ Yes☐ No

24. What was the most positive thing about your experience calling this branch?

25. Provide any additional information and observations about your experience:

26. Based on your conversation with the representative, how likely would you be to recommend City National Bank to a friend or colleague?

10 = Extremely likely; 0 = Not at all likely

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|-----------------------------|----------------------------|
| ☐ 10 | ☐ 4 |
| ☐ 9 | ☐ 3 |
| ☐ 8 | ☐ 2 |
| ☐ 7 | ☐ 1 |
| ☐ 6 | ☐ 0 |
| ☐ 5 | |

END OF QUESTIONNAIRE