

CITY NATIONAL BANK

PLATFORM

INSTRUCTIONS

QUESTIONNAIRE

Ask a banking representative about personal checking accounts to ensure they are building rapport with customers, identifying needs, and recommending appropriate solutions.

Before You Begin

- Review your shop confirmation
- Know your scenario
- Confirm business hours

Don't Forget!

- Arrive during business hours
- Follow your assigned scenario
- Get a business card (and date it)



General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Complete your shop during business hours. Check bankatcity.com for your assigned location's business hours prior to your shop.
 - Do not arrive within an hour of closing.
- Ask about the bank's personal checking account options.
 - Do not complete any of your own personal banking during this shop.
- Get a business card (or brochure if no business cards) to upload with your report.
 - Before uploading, write your shop date on the card and all brochures obtained.
- Submit your report to shopperhub.cxgroup.com within 12 hours of completing the shop.
- You or your immediate family members cannot have ever worked for City National Bank.



Shop Instructions

- Observe the appearance of the exterior and interior of the branch.
- Note how long it takes to be acknowledged and assisted once you enter the branch.
- You're interested in opening a new personal checking account and want to know your options.
 - A customer service representative/teller may offer to help you with the account, or they may direct you to another representative in the branch.
 - If you are directed to another representative, agree to be assisted by the other person.
 - Let the representative take the lead in the conversation.
 - Respond to any questions you are asked about your account needs as you normally would as a potential customer.

- Allow the representative to ask for your name. Do not provide it without prompting.
 - It's important for you to tell us if the representative uses your name and how often.
- Do not open an account. Indicate that you will return later if you decide to open an account.
- Get the representative's name and physical description. Ask for their name if not mentioned.
- Give the representative a chance to offer a business card. If they don't, take one before leaving.
 - If a business card is not in sight, ask the representative for one.
 - If no business cards are available, take a brochure as proof of visit.
- **Important!** Write your shop date on the business card and on all brochures obtained before you upload them with your report.
 - Do not throw the business card or brochures away. Keep the hard copies for six months following your shop.

 **QUESTIONNAIRE**

Shop date:

Start time:

End time:

Platform

1. What observations did you make about the external and/or internal physical appearance of the branch facility?

Comment on the cleanliness, organization, etc. of the exterior and/or interior.

2. When you entered the bank, were you acknowledged by someone in a reasonable amount of time?

This could be a nod, smile, wave, speaking to you, etc. before you were actively assisted with your inquiry.

Yes No

3. If you had to wait to be assisted, did any representative acknowledge the wait in some way?

For example: Thank you for waiting, Sorry to keep you waiting, etc.

Yes N/A – no wait
 No

4. Primary representative's name:

Provide the representative's full name, exactly as it appears on their business card. For example: John A. Smith, Jr.

5. Description of primary representative:

Provide a full description that includes gender, hair color/length, approximate height, and approximate age.

6. If you interacted with others, please describe:

If someone else greeted you or communicated with you at any time during the visit, briefly describe the circumstances. Enter N/A if you only interacted with one bank representative during your visit.

7. Did the representative who assisted you with your inquiry verbally greet you?

Yes No

8. Did the representative stand up when greeting you?

Answer Yes if the representative was already standing.

Yes No

9. Did the representative voluntarily introduce himself or herself by name?

Yes No

10. Were any context-setting questions asked by the representative?

For example, asking what brought you into City National today, how you heard about City National, if you were referred by someone, if you currently or have ever banked at City National, etc.

Yes No

11. 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

12. Did the representative ask any questions about significant purchases or expenses you might have OR position their ability 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

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

Yes No

14. Did the representative ask for your name at any point during the interaction?

Yes No

15. Did the representative use your name at any time during the interaction?

Yes No

16. How many times was your name used during the interaction?

Enter a number (0, 1, 2, 3, etc.).

17. Did the representative smile at any point during the interaction?

Yes No

18. Did the representative make appropriate eye contact with you during the interaction?

Yes No

19. Did the representative remain upbeat and professional during the interaction?

Yes No

20. Did the representative make you feel like he or she was glad you came into the bank today?

Yes No

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

22. Did the representative take any notes during your conversation?

Yes No

23. 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

24. Did the representative offer a business card?

Yes No

25. 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 while you're here?, etc.

Yes No

26. Did the representative verbally thank you at the end of the interaction?

The representative should make some statement of appreciation for your visit by saying thanks, thank you, appreciate you coming in today, etc.

Yes

No

27. What was the most positive thing about your experience visiting this branch?

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

29. Based on this visit, how likely would you be to recommend City National Bank to a friend or colleague?

10 = Extremely likely; 0 = Not at all likely

10

4

9

3

8

2

7

1

6

0

5

30. Upload a business card (or brochure) as proof of shop:

Write your shop date on the business card and all brochures before uploading.

END OF QUESTIONNAIRE