

# CITY NATIONAL BANK

## TRANSACTION

# INSTRUCTIONS

## QUESTIONNAIRE

Complete a bank transaction (deposit) to determine if customer service representatives are connecting with customers and ensuring customer needs are being met during each visit.

### Before You Begin

- Review your shop confirmation
- Be a current customer of City National
- Be prepared to make a deposit
- Confirm business hours

### Don't Forget!

- Arrive during business hours
- Bring your ID and account numbers
- Make a deposit as your transaction
- Get a receipt as proof of shop



### General Requirements

- You must be a current customer of City National Bank to complete this assignment.
- Read all instructions and the entire questionnaire before you complete the shop.
- Complete your shop during business hours. Check [bankatcity.com](http://bankatcity.com) for your assigned location's business hours prior to your shop.
- You may choose whether you complete your visit inside the branch or at the drive-thru.
- Make a deposit as your transaction.
  - Do not make an account inquiry, ask for change, withdraw cash, or make a simple account transfer.
- Get a copy of your receipt from the transaction to upload with your report.
  - Black out sensitive info before uploading (your name, account number, amounts, etc.).
  - If unable to obtain a receipt, upload a dated bank statement showing the transaction.
- Submit your report to [shopperhub.cxgroup.com](http://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 have ever worked for City National Bank.

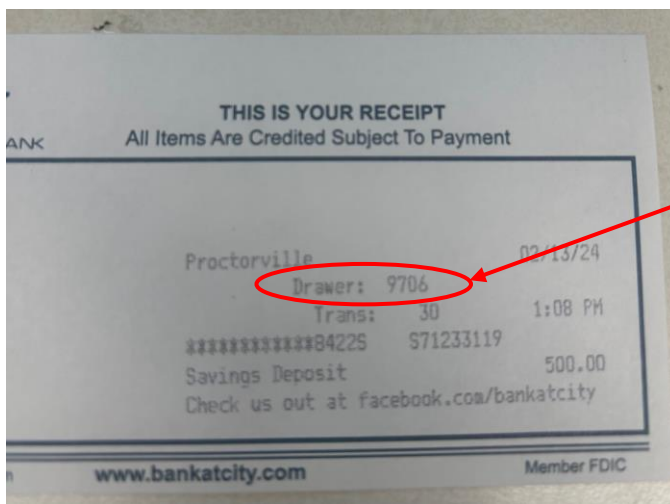


### Shop Instructions

- Observe the appearance of the exterior and/or interior of the branch.
- Go directly to the teller counter inside the branch or to the drive-thru, if available.
  - If using drive-thru, choose a lane where you can see the representative (if possible).
- Complete a transaction.
  - This should be a deposit and not an account transfer, change order, withdrawal, or

account inquiry.

- Let the customer service representative take the lead in the conversation.
- Respond to any questions you are asked about your transaction as you normally would as a customer of City National Bank.
- Count how many times the representative uses your name during the transaction.
- Note if any products or services unrelated to your transaction are mentioned.
  - Do not prompt for this information if not mentioned.
- Get the representative's name and physical description. Ask for their name if not mentioned.
- Get a receipt for the completed transaction. Ask for a receipt if not offered.
  - Enter the drawer number from your receipt in your report.
  - If a receipt cannot be printed for your transaction, upload a screenshot of your account activity from your bank statement showing the transaction performed during your visit.



Drawer number will be located on the right side of your receipt as shown here.

 **QUESTIONNAIRE**

Shop date:

Start time:

End time:

### Transaction

1. Where did you conduct your transaction?

Drive-thru window

In branch

2. 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.*

3. When you entered the bank or pulled up to the drive-thru window/tube, 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 transaction.*

Yes

No

4. If you had to wait for assistance, did the 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

5. Did the representative who conducted your transaction verbally greet you when you first approached him or her for assistance?

Yes

No

6. Representative's name:

*This is the representative who conducted your transaction.*

7. Description of representative who assisted you:

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

8. Drawer number:

*Enter the 3-4 digit drawer number from your receipt, or enter N/A if you were unable to obtain a receipt.*

9. Did the representative who conducted your transaction use your name at any time during the interaction?

Yes

No

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

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

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

Yes

No

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

Yes

No

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

Yes

No

14. Did the representative ask any additional questions about your financial needs or make you aware of additional products or services?

*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), asking about your savings goals, mentioning credit card or mobile banking benefits, etc.*

Yes

No

15. If yes, provide details on what was asked or mentioned:

16. 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

17. 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

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

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

20. 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

21. Upload the receipt from your transaction:

END OF QUESTIONNAIRE