

# CITY NATIONAL BANK

## VIDEO BANKING

# INSTRUCTIONS

## QUESTIONNAIRE

Complete a video banking transaction to determine if the representatives are connecting with customers and ensuring customer needs are being met during each visit.

### Before You Begin

- Review your shop confirmation
- Select your transaction scenario
- Confirm video banking hours

### Don't Forget!

- Arrive during video banking hours
- Complete an approved transaction
- Get a receipt as proof of shop



## General Requirements

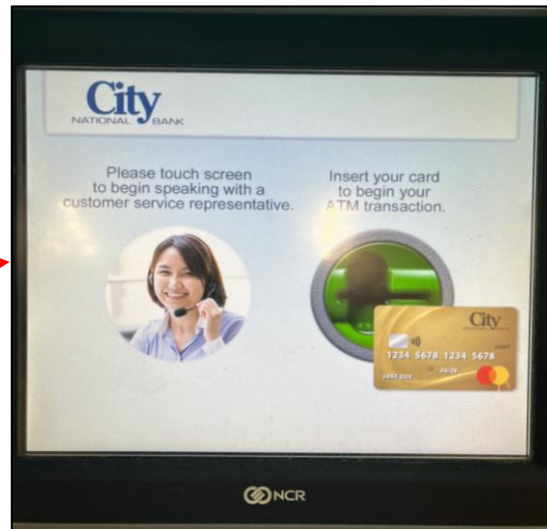
- You must be a current customer of City National Bank to complete this assignment.
- Read all instructions and the entire questionnaire before you complete the shop.
- Complete your shop during video banking hours. Check [bankatcity.com/videobanker](http://bankatcity.com/videobanker) for your assigned location's business hours prior to your shop.
- Have a device available that can record wait times (in minutes:seconds).
- Complete a transaction at the video banking machine.
- 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.



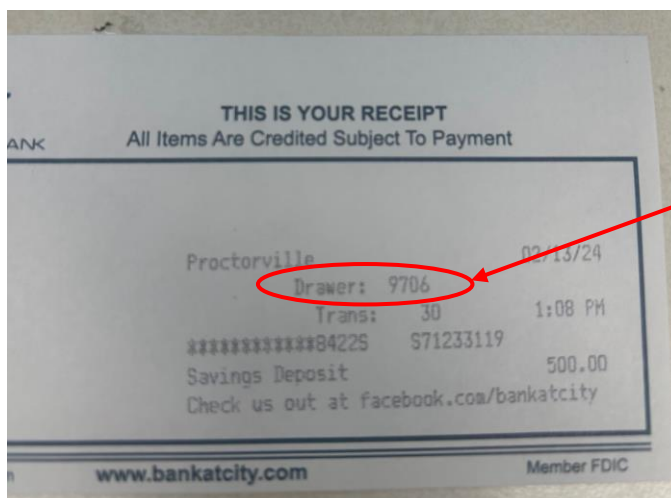
## Shop Instructions

- Observe the appearance of the exterior of the branch or location if standalone video machine.
- Count the number of customers you can see in all drive-thru lanes.
- Time how long it takes to be assisted once you join the lane for video banking.
- Go directly to the video banking machine. Select "Talk with a banker" on the screen to begin your transaction.
- Complete one of the following transactions with a live banker:
  1. **Cash a check:** Show a valid ID, such as a driver's license.
  2. **Deposit checks or cash (no coins):** Provide your account number or show a valid ID.

3. **Withdraw cash:** Request a withdrawal from a live banker with just a driver's license to pull cash out like at a traditional ATM. You may specify the denominations of \$50, \$20, \$5, and \$1 bills you wish to receive. Simply tell your video banker.
  4. **Make a payment:** Make your loan, safe deposit box, or City National credit card payment by cash, by check, or by transfer from a City National account.
- Time how long (in minutes) it takes to complete your transaction.
  - 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 video banker uses your name during the transaction.
  - Get the representative's name. Ask for their name if not mentioned.
  - Get a receipt for the completed transaction.
    - 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.



Touch the screen to initiate conversation with a live banker.



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

 **QUESTIONNAIRE**

Shop date:

Start time:

End time:

### Video Banking

1. How many customers could you see in all drive-thru lanes?

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

2. What observations did you make about the external physical appearance of the branch facility?

*Comment on the cleanliness, organization, etc. of the exterior area where the machine is located.*

3. How long did you wait to be assisted after you joined the lane for video banking?

Less than 30 seconds

2 minutes to 5 minutes

30 seconds to 59 seconds

Over 5 minutes

1 minute to 1:59 minutes

4. When you pressed the service button on the video banker machine, were you acknowledged in a reasonable amount of time?

Yes

No

5. 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

6. Did the representative introduce himself or herself by name?

Yes

No

7. Representative's name:

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 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. Were you able to complete your transaction with the representative?

Yes

No

12. From the time you pulled in front of the video banker machine, how long (in minutes) did it take to complete your transaction?

*Example format: 05:00 for 5 minutes*

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

Yes

No

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

Yes

No

15. 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

16. 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

17. Compared with your typical bank drive-thru service, how would you compare today's video banker experience?

Better

Same

Worse

18. Explain your answer:

19. How was using the video banker service compared to what you expected?

Better

Same

Worse

20. Explain your answer:

21. What was the most positive thing about your experience during this visit?

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

23. 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

24. Upload the receipt from your transaction:

END OF QUESTIONNAIRE