

# ALPINE BANK

## TELESERVICES

# INSTRUCTIONS

## QUESTIONNAIRE

Discuss a specific product or service with an Alpine Bank Communication Center and Internet Banking support representative to ensure they are connecting with customers, asking needs-based questions, and recommending solutions to help customers meet their needs.

### Before You Begin

- Review your shop confirmation
- Know your scenario (what to ask)
- Have a distraction-free environment

### Don't Forget!

- Record the call using CX Group's IVR
- Call during specified business hours
- Get the name of the employee



## General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- All phone calls must be recorded through CX Group's IVR system.
- All phone calls must be completed Monday–Friday from 7:30 AM–5:00 PM MST.
- Check your shop confirmation for the scenario you are required to present.
  - Present your scenario based on you alone (do not ask about joint accounts or accounts for family members).
- Have a device available that can record the wait to be assisted (in minutes:seconds).
- Do not give your full 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 are assigned more than one Teleservices shop during the same month, using a different name during each call will help keep your identity anonymous. However, if your inquiry includes information about your own account that already exists at Alpine Bank, please use your real name.
- Submit your report to [shopperhub.cxgroup.com](https://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 currently nor have ever worked for Alpine Bank.



## Shop Instructions

### Step #1: Call into CX Group's phone system to record the conversation

- Call into CX Group's IVR phone system at 866-265-6212 (toll free).

- Once you dial into the IVR system, you will be prompted to enter your assignment number. This can be found on your shop confirmation. Only enter the first series of numbers. For example, if your assignment number is 2089568-3658147, you would enter 2089568.
- After entering your assignment number, the system will ask you to dial the phone number you would like to call. Dial the call center phone number found in your shop confirmation, and follow the prompts. Do not dial a "1" before the area code once in the IVR system.
  - If you are an existing customer, please call one of the branches directly, rather than the phone number in your shop confirmation, to retain your anonymity. The branch phone numbers can be found at <https://www.alpinebank.com/who-we-are/locations-hours.html>
- If you receive a recording/voicemail, the call is disconnected, or you get a busy signal, hang up and call back later the same day (all call attempts must be recorded through the IVR).
- If you get an error message from the IVR when calling the 866 phone number, try calling 617-284-5807 instead (this is an alternate phone number for the IVR).
- You will get an IVR confirmation number. Write down the number and enter it in your report.

### Unsuccessful calls

- If you receive a recording/voicemail, an employee 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 (all call attempts must be recorded).
- If you have attempted to call three times during business hours and cannot get through to someone to complete your scenario, contact your scheduler.

### **Step #2: Speak with the representative**

- Time how long (minutes:seconds) it takes to reach an employee after going through the automated menu.
- Count the number of times the phone rings before being answered.
- Present the scenario as listed in your shop confirmation.
  - Let the employee take the lead in the conversation.
  - Respond to any questions you are asked as if you are someone who is interested in the particular product you are requesting.
  - Do not mention your name until the employee asks for it.
  - If you do not live in Colorado, do not mention this during the call.
  - Do not provide personal information (account numbers, SSNs, etc.) or use your real name unless your inquiry refers to your own account that already exists at Alpine Bank.
- Get the name of the employee. If not mentioned by the end of the call, ask for their name.
- At the end of the conversation, thank the employee for the information and politely end the call. Do not open an account. 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:

## Visit Information

1. Employee name:

2. How many rings did you hear before the phone was answered?

0-2

5-6

3-4

More than 6

3. How long did you wait to be assisted?

*Start timing after the automated menu recording, and stop timing once you have reached someone who can assist you with your inquiry.*

1 minute or less

3:01 – 4 minutes

1:01 – 2 minutes

4:01 – 5 minutes

2:01 – 3 minutes

More than 5 minutes

## Connect

4. Did the employee state their name clearly?

Yes

No

5. Did the employee have a positive attitude with a smile in their voice and greet you in a friendly manner to build rapport?

Yes

No

6. Did the employee ask for your name at any time?

Yes

No

7. Did the employee use a request to serve statement?

*This is any question or statement indicating the employee is ready to assist you, such as "How may I help you?", "I can help you", etc.*

Yes

No

8. Did the employee handle your interaction in a professional manner?

Yes

No

## Ask

9. Did the employee ask needs-based questions to understand your needs?

*This includes questions such as: Do you have accounts with Alpine Bank currently? Are you interested in a checking or savings account? How often do you need access to your funds? What is your average balance? How many checks do you normally write? What do you look for in a banking relationship? What are your savings goals? What did you like/dislike most about your previous bank? Do you have a smartphone? Have you used online banking/mobile banking previously?*

Yes

No

10. List all questions that were asked to assess your needs, or explain what occurred if questions were not asked:

- *If Yes, enter the verbatim questions you were asked.*
- *If No, provide commentary to explain what the employee said or did instead after you made your inquiry.*

11. Did the employee listen to you in order to understand and respond to your inquiry?

Yes

No

## Recommend

12. Did the employee describe the features of the product or service in a way that you could understand?

*Features are any factual statements made about the product or service. For example, telling you the required minimum balance, maintenance fee charge, interest bearing, payment terms, payment timeframe, etc.*

Yes

No

13. Explain all features that were mentioned, or explain what occurred if features were not mentioned:

- *If Yes, enter specifically what the employee said about product/service features.*
- *If No, provide at least one sentence of commentary to support your response.*

14. Did the employee mention any benefits of the product or service when discussing it?

*Benefits are statements about how the product or service could help you as a customer. For example, easy access to funds, unlimited check writing, a lower fee, not having to worry about keeping a minimum balance, commenting that using a product or service saves time or saves money or is "easy", "quick", "convenient", etc.*

Yes

No

15. Explain all benefits that were mentioned, or explain what occurred if benefits were not mentioned:

- *If Yes, enter specifically what the employee said about product/service benefits.*
- *If No, provide at least one sentence of commentary to support your response.*

16. Did the employee mention or recommend any other products or services?

*Pay close attention to any mention of an additional product or service. This includes but is not limited to debit cards, online banking, additional account types, etc.*

Yes

No

17. If yes, list all other products and services that were mentioned or recommended:

## Exceed

18. If additional information was needed, did the employee refer you to another employee or department in a friendly and courteous manner?

Yes

N/A – referral not needed

No

19. Did the employee ask for your business?

*For example, did the employee let you know you could open an account online or in a branch?*

Yes

No

20. Explain how the employee asked you to activate a product or service, or explain what occurred if the employee did not ask for your business:

- *If Yes, explain exactly what the employee said or did when asking to activate a product or service for you.*

- *If No, explain how the conversation ended.*

21. Did the employee thank you for your inquiry?

Yes

No

22. Did the employee use your name at least once during the conversation?

Yes

No

23. Overall comments:

*Describe your interaction with the employee in detail, including the questions you asked, how your questions were answered, and any information provided about the products and services.*

24. Based on your interaction with the employee, on a scale from 0 - 10, how likely would you be to recommend Alpine 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

25. Explain your rating:

*If your rating is 10, explain why you would recommend. If your rating is lower than 10, comment on what the employee could have said or done to improve the interaction.*

END OF QUESTIONNAIRE