

# FIRST NATIONAL BANK

## WEB INQUIRY MYSTERY SHOP

# INSTRUCTIONS • QUESTIONNAIRE

You will submit a web inquiry to the bank, in which you will present a general need scenario and ask a question. You will evaluate all responses received via phone call, email, and text message within 24 hours.



### Before You Begin

- Review your shop confirmation
- Prepare a general need scenario
- Know where to submit your web inquiry
- Review screenshot requirements



### Don't Forget!

- Present a valid scenario & ask a question
- Monitor all channels of communication for follow-up for 24 hours—phone, email, text
- Take all required screenshots



## General Requirements




- **Submission Deadline: 12:00 PM EST two days following your scheduled shop date** (e.g., if scheduled shop date is 1/1/2020, submit your completed survey by 12:00 PM EST on 1/3/2020). The deadline is noted in eastern standard time. If your completed survey is not submitted to [shopperhub.cxgroup.com](https://shopperhub.cxgroup.com) by the deadline, it will be automatically cancelled.
- Read all instructions and the entire questionnaire before you complete the shop.
- Answer all questions and provide detailed supporting narrative to explain your responses.
- Take a screenshot of your web inquiry confirmation for shop validation.
- Do not reveal your identity as a mystery shopper to anyone at any time.
- Do not say or do anything to limit the opportunity for the associate(s) to perform the behaviors the survey is designed to evaluate.
- If a Quality Assurance Editor contacts you for additional information or clarification about your experience, respond promptly.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot currently nor have ever worked for First National Bank.
- You can be a current bank member or a new customer—different example scenarios provided below.
- You do not need to set up any account to complete this shop.
- Failure to follow the specifications for this project as outlined in this document may result in shop cancellation and non-payment.

# Shop Instructions

## Step #1: Submit a web inquiry to First National Bank.

- Click this link to be routed to the FNB web inquiry portal: [fnbank.net/get-in-touch/contact-us](https://fnbank.net/get-in-touch/contact-us)
- Scroll down to the “Contact Us” form, which looks like this:

FDIC FDIC-Insured - Backed by the full faith and credit of the U.S. Government

 [Personal](#) [Commercial](#) [Home](#) [Resources](#) [Get In Touch](#) [Log In](#)  

### Contact Us

\*Indicates required field


First Name*	Last Name*	
<input type="text"/>	<input type="text"/>	
Street Address*	Business Name (if applicable)	
<input type="text"/>	<input type="text"/>	
City*	State* <input type="text" value="v"/>	Zip*
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email Address*	Phone Number*	
<input type="text"/>	<input type="text"/>	

Are you a current customer of our bank? \*  Yes  No


Best Method of Contact: \*  Phone  Email

**Please note:** Do not include sensitive information below such as your social security number, account number or online password. Online passwords cannot be reset via this form. You may call the bank at 870-215-4000 during business hours to request online banking assistance. By providing a telephone number and submitting the form you are consenting to be contacted by SMS text message. Message & data rates may apply. Reply STOP to opt out of further messaging.

Enter your message below. Thank you for contacting FNB!

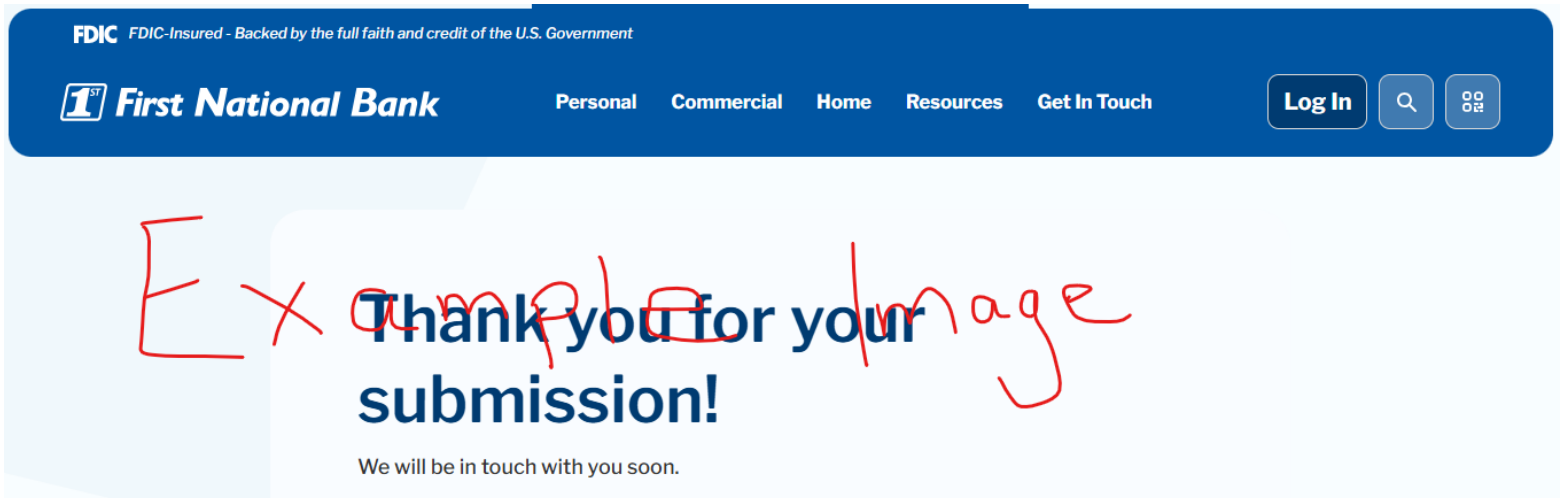
  
Enter the characters you see\*

[Audio Captcha](#)  
[Refresh](#)

[SUBMIT YOUR MESSAGE](#) 

- Enter your real name, email address, and phone number.
  - You will be monitoring for email and phone/text follow-up, so you MUST provide valid and accurate contact information. The information should match your CX Group shopper profile.
  - If you have an identifying email address (e.g., mysteryshopper123@gmail.com), you must set up and use a different non-identifying email address for your inquiry.
- If you are not local to an area that has a First National Bank location, look up and enter a local address for a house/apartment.
  - Do NOT enter a business address or enter a business name.
  - You can find a list of FNB locations by clicking [here](#) and scrolling down. You can then look on a website such as Zillow to find a local address. Do not contact any of the locations directly. You must use the contact form indicated above.
- Select “Email” for best method of contact. You will be evaluating all types of follow-up received for this shop, but the goal is to elicit an email response.
- In the message box, present a general need scenario that aligns with whether you are a current First National Bank customer or a new customer. Examples:
  - Current Customer:
    - You would like to speak with an associate about opening another account.
    - Your friend recently lost their debit or credit card, and it made you think about account/card protection. Indicate you would like to speak with an associate about this.
    - You would like information on personal loan rates.
  - New Customer:
    - You would like to get information on opening an account.
    - You would like information on a short- or long-term savings account.
- In the message box, ask an open-ended question that aligns with your scenario. Asking a question is DIFFERENT than simply presenting your scenario. For example:
  - What is the process to open a new account?
  - What steps can I take to protect my account if my card is lost or stolen?
  - How do I know if I qualify for various loan rates?
  - How would opening this type of account benefit me?
- **You must present a general need scenario AND ask an open-ended question for your shop to be valid.**
- Do not provide any personal information beyond what is asked for in the contact form (e.g., social security number, account numbers, passwords, or other secure/sensitive information).
- Do not actually sign up for any accounts or services as part of this shop.
- Copy your scenario/question text from the message box and save it off BEFORE you submit your inquiry. You will need to paste the exact text of your scenario/question into your survey form.
- Click “Submit Your Message.”

- Take a screenshot of your web inquiry confirmation page, which should look like this:



- Include the date and time in your screenshot.

### Step #2: Monitor phone, email, and text for follow-up for 24 hours.

- Evaluate ALL follow-up communication received from First National Bank within 24 hours after you submit your web inquiry. This includes any communication received via phone, email, and text message.
- Monitor all channels of communication, including junk/spam email folders and missed calls/voicemail, to ensure you do not miss the communication.
- Criteria to evaluate include:
  - Professionalism of written response (clear, free of errors, etc.)
  - Tone of response (warm and cordial, etc.)
  - Expresses appreciation
  - Personalizes response (i.e., uses your name)
  - Demonstrates knowledge
  - Invites you to visit the bank
- After 24 hours have passed since you submitted your web inquiry, finish filling out your survey and submit it, even if no follow-up was received.
- Do not submit your survey until the full 24-hour follow-up period has passed. Even if you receive one follow-up right away, you must monitor to see if you receive any additional follow-up in the 24-hour period.
- You must accurately report ALL follow-up attempts. The client is able to review call, text, and email records for verification.
- Provide screenshots of any email and text message responses received—see requirements below.
- You will need to copy/paste the exact content of any emails received into your survey form.

### Step #3: Evaluate your overall experience.

- Evaluate your overall experience, including your satisfaction with the agent who responded to you, your likelihood to use this bank for your banking needs, your likelihood to recommend this bank to friends/family, any opportunities for improvement, and anything that stood out as exceptionally positive or negative.



## Screenshot Requirements

### WEB INQUIRY CONFIRMATION:

- Take a screenshot of the page you are routed to after you submit your web inquiry.
- Include the date and time in the screenshot.

### EMAIL COMMUNICATION:

- If applicable, take screenshots of the follow-up email responses you received. If you received multiple emails, you may need to take multiple screenshots to show all content.
- Include date, time, email address, and all content in the screenshots.

### TEXT MESSAGE COMMUNICATION:

- If applicable, take screenshots of the follow-up text messages you received. If the content does not fit in one image, take multiple screenshots to show the entire string of communication.
- Include date, time, phone number, and all content in the screenshots.

**Shops that do not include the required screenshots/documentation as outlined above will be rejected without payment.**



# QUESTIONNAIRE

**Shop date:**

**Start time:**

**End time:**

## Web Inquiry Details

**1. Time Inquiry Submitted:**

*Format response as HH:MM AM/PM*

**2. Date Inquiry Submitted:**

*Format response as MM/DD/YYYY*

**3. Web Address (where inquiry was made):**

*Enter the exact web address of the website where you made your inquiry.*

**4. Web Inquiry Content Submitted:**

*Copy/paste the text of your web inquiry here, showing the scenario you presented and the question asked.*

**5. Website is easy to navigate**

Website offers ease of navigation AND professionalism of design/look (10 points)

Website offers ease of navigation OR professionalism of design/look (5 points)

Website is difficult to navigate AND unattractive or unprofessional (0 points)

**6. Web Inquiry Details Supporting Narrative:**

*Explain the responses you selected for the Web Inquiry Details questions. Be sure to explain ALL responses of less than full point value. You must enter between 50 and 1500 characters.*

## Web Associate Interaction

**7. Indicate all types of follow-up you received:**

*Select all types of follow-up that you received within 24 hours from the time you submitted your inquiry. Be sure to check all channels of communication (including junk/spam email folders and missed calls/voicemails). In the rare case that you do not receive any response within 24 hours, select N/A.*

Phone Call

Email

Text Message

N/A

**8. Date and time of follow-up phone call received:**

*If applicable, format response as MM/DD/YYYY HH:MM AM/PM (e.g., 3/7/2025 6:00 PM). If you received multiple phone calls, enter the date and time of the FIRST phone call. Enter N/A (in that exact format) if you did not receive any phone call follow-up.*

**9. Indicate the phone number of the phone call received:**

*If applicable, format response as 999-999-9999. Enter N/A (in that exact format) if you did not receive any phone call follow-up.*

**10. Explain the follow-up phone call received, including what information was provided:**

*If applicable, enter between 50 and 1500 characters to explain the phone call received. Enter N/A (in that exact format) if you did not receive any phone call follow-up.*

**11. Date and time of follow-up email received:**

*If applicable, format response as MM/DD/YYYY HH:MM AM/PM (e.g., 3/7/2025 6:00 PM). If you received multiple emails, enter the date and time of the FIRST email. Enter N/A (in that exact format) if you did not receive any email follow-up.*

**12. Indicate the email address of the email received:**

*If applicable, provide the "From" email address of the email you received. If you received multiple emails, enter the address of the FIRST email you received. Enter N/A (in that exact format) if you did not receive any email follow-up.*

**13. Exact follow-up email response(s) received:**

*If applicable, copy/paste the exact text for ALL emails received within the 24-hour follow-up period into this box. You MUST copy/paste - do NOT paraphrase. Provide the complete text from EACH email received. Enter N/A (in that exact format) if you did not receive any email follow-up.*

**14. Date and time of follow-up text message received:**

*If applicable, format response as MM/DD/YYYY HH:MM AM/PM (e.g., 3/7/2025 6:00 PM). If you received multiple text messages, enter the date and time of the FIRST text message. Enter N/A (in that exact format) if you did not receive any text message follow-up.*

**15. Indicate the phone number of the text message received:**

*If applicable, format response as 999-999-9999. Enter N/A (in that exact format) if you did not receive any text message follow-up.*

**16. Do you have screenshots of the follow-up text messages received?**

*If applicable, select Yes and upload screenshots of the text messages received. Images must show the entire text message content. Upload multiple images if necessary to show the entire text string. Select N/A if you did not receive any text message follow-up.*

Yes

No

N/A

**17. Demonstrates professionalism**

*This question evaluates a written response (i.e., email or text message). Select the bottom response if you did not receive any written responses.*

Response text is written in a clear, comprehensible manner AND is free of spelling, punctuation, and/or grammatical errors (10 points)

Response text is NOT written in a clear, comprehensible manner OR contains minor spelling, punctuation, and/or grammatical errors (5 points)

Response text is NOT written in a clear, comprehensible manner AND contains numerous spelling, punctuation, and/or grammatical errors OR no written response received (0 points)

**18. Displays upbeat tone**

Response is warm and cordial (10 points)

Response is neutral but professional (5 points)

Response is mechanical or unprofessional OR no response received (0 points)

**19. Expresses appreciation**

Thanks you / expresses appreciation for your interest (10 points)

Does NOT thank you / express appreciation for your interest OR no response received (0 points)

**20. Personalizes response**

Uses your name in the response (10 points)

Does not use your name in the response OR no response received (0 points)

**21. Demonstrates knowledge**

- Information received appropriately answers your request AND additional helpful information is provided (e.g., products, services, etc.) (10 points)
- Information received appropriately answers your request BUT no additional information is provided (5 points)
- Information received is incomplete OR does NOT provide the information you requested OR no response received (0 points)

**22. Extends an invitation to visit**

- Invites you to visit your local First National Bank (10 points)
- Does not invite you to visit First National Bank OR no response received (0 points)

**23. Web Associate Interaction Supporting Narrative:**

*Explain the responses you selected for the Web Associate Interaction questions. Be sure to explain ALL responses of less than full point value. In the rare instance that you did not receive any follow-up, please confirm that you checked all channels of communication, including: missed calls, voicemails, text messages, and all email folders including junk and spam folders. You must enter between 150 and 2000 characters.*

**Overall Impression****24. Based on your web experience with this agent, how satisfied are you with your web experience?**

- |  |   |
|--|---|
| <input type="checkbox"/> 1 = Very Dissatisfied | <input type="checkbox"/> 7                          |
| <input type="checkbox"/> 2                     | <input type="checkbox"/> 8                          |
| <input type="checkbox"/> 3                     | <input type="checkbox"/> 9                          |
| <input type="checkbox"/> 4                     | <input type="checkbox"/> 10 = Very Satisfied        |
| <input type="checkbox"/> 5                     | <input type="checkbox"/> N/A - no response received |
| <input type="checkbox"/> 6                     |   |

*This question evaluates the AGENT who responded to you. Select N/A if you did not receive any follow-up response.*

**25. Based on your web experience with this company, how likely would you be to proceed to them for your banking needs?**

*This question evaluates the COMPANY based on your web experience.*

- Extremely likely
- Likely
- Neither likely nor unlikely
- Unlikely
- Extremely unlikely

**26. How likely would you be to recommend this company to friends/family?**

- Extremely likely
- Likely
- Neither likely nor unlikely
- Unlikely
- Extremely unlikely

**27. Explain anything that could have improved your experience:**

*Enter between 3 and 1000 characters.*

**28. Explain anything that was exceptional or positively unique during your experience:**

*Enter between 3 and 1000 characters.*

**29. Overall Impression Supporting Narrative:**

*Explain the responses you selected for the Overall Impression questions. Be sure to explain ALL responses of less than full point value. You must enter between 150 and 2000 characters.*

## Shop Validation

**30. Do you have a screenshot of your web inquiry confirmation?**

*Select Yes and upload a screenshot of your web inquiry confirmation.*

Yes

No

**31. If you do not have a screenshot of your web inquiry confirmation, explain why:**

*Enter N/A if you uploaded your web inquiry confirmation.*

**32. Do you have screenshots of any email responses you received?**

*If you received email responses, select Yes and upload screenshots of the emails received. If you did not receive any email responses, select No.*

Yes

No

END OF QUESTIONNAIRE