

IntegratedQSG's Mystery Shopping Program
Financial Institution: Sample Bank

Directions: Enter "0" for Does Not Meet Expectations, "1" for Meets Expectations, "2" for Excellent Service. Leave blank for those that do not apply.

Employee Name	Branch or Department	Date/Time	Greeting and Interaction								Service/Sales Skills				Product Knowledge			Overall Professionalism			Hold	Ask permission to Place on Hold	Wait for Reply	Give Reason for Hold	Use Hold Button	Keep on Hold Less Than 30 Seconds	Thank Caller for Holding	Transfer	Tell Caller They are Being Transferred	Tell Caller Why They are Being Transferred	Give Name of Person Receiving Transfer	Give Number of Person Receiving the Transfer	Score		
			Answer Promptly - Within Three Rings	Identify Department or Financial Institution	Identify Self	Professional Tone	Ask Caller's Name	Use Caller's Name	Thank Caller	Understand/Restate Request	Ask Questions to Determine Needs	Demonstrate Willingness to Help	Ask for Business	Offer Appropriate Solutions or Options	Friendliness	Sincerity	Understand/Restate Request	Ask Questions to Determine Needs	Demonstrate Willingness to Help	Ask for Business														Offer Appropriate Solutions or Options	
Donna	Branch 1	7/20/2005 @ 3:04	1	1	1	1	1	1	0	1	1	1	1	1	1	1	0	1	1	0	1	0	1	1	0	1	0							80%	
Angie	Branch 1	7/25/2005 @ 11:12	1	1	1	1	0	0	0	0	0	0	0	0	1	0													1	1	0	0	39%		
Regina	Branch 1	7/20/2005 @ 2:45	1	1	1	1	0	0	1	1	0	1	1	1	1	1							0	1	1	1	1	0							75%
Judy B.	Branch 2	8/10/2005 @ 2:19	1	1	1	1	0	0	0	0	1	1	0	1	1	1																	64%		
Wendy	Branch 2	7/20/2005 @ 2:50	1	1	1	1	1	1	1	1	1	1	1	1	1	1																	100%		
Lisa	Branch 2	8/10/2005 @ 2:21	1	1	1	1	1	1	1	1	1	1	1	1	1	1																	100%		
Susan	Branch 3	7/20/2005 @ 3:12			1	1	0	0	0	1	1	0	1	1	1	1																	67%		
Receptionist	Branch 3	7/25/2005 @ 10:59	1	1	0	1	0	0	0	1	0	0	0	1	1	1													1	1	1	0	56%		
Dot	Branch 3	7/20/2005 @ 2:35			1	1	1	1	1	1	1	1	1	1	1																	100%			
Brenda	Branch 4	7/25/2005 @ 11:05	1	1	1	1	1	1	1	1	1	1	1	1	1	1																	100%		
Deanna	Branch 4	7/20/2005 @ 2:57	1	1	1	1	1	1	1	1	1	1	1	1	1	1																	100%		
Lori	Branch 4	7/25/2005 @ 11:16			1	1	1	1	1	1	1	1	1	1	1	1																	100%		
Overall Score			Ratings 70%-79% = Average; 80%-89 = Good; 90+ = Great																								81%								

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Employee Name	Branch or Department	Date/Time	Comments
Donna	Branch 1	7/20/2005 @ 3:04	Donna was personable, yet "to the point." "Do you have a bank account? A savings account is always a good place to put money." She mentioned a lot of people liked to use a Christmas Club account to save because you couldn't get the money out until October. She said I could have money directly debited from my pay check. I inquired about the interest rate. She covered the phone to find out. I could hear muffled "What is the rate on the Christmas club?" She asked if I lived there. Donna gave me her name again and said I could speak with her or Sherry.
Angie	Branch 1	7/25/2005 @ 11:12	"Let me let you talk to the right person because I don't know CD rates." I was transferred to Sherry's voicemail. Not a great first impression!
Regina	Branch 1	7/20/2005 @ 2:45	Regina replied, "You can come into the bank and talk with Sue Smith about opening a savings account." I asked if she knew what kind of rate it was receiving. She put me on hold to find out. She came back to say that I would need to speak with Sue and she was with a customer. Regina offered to put me through to her voicemail or have her return my call.
Judy B.	Branch 2	8/10/2005 @ 2:19	"No, I wouldn't be able to give them to you. Sue is the person you would need to talk to but she is with a customer." Judy asked if I wanted to leave a voicemail or if I would like her to call me back. I said she could transfer me to voicemail. I was transferred to Travis' voicemail instead of Sue's.
Wendy	Branch 2	7/20/2005 @ 2:50	Very professional, friendly. "Do you have a checking account with us?" Wendy explained the details of their regular savings account. She asked about my situation again. She mentioned that a shorter term CD might be a good option as well, although there would be a penalty for withdrawing. "What kind of deposit are we talking about?" After mentioning it would be about \$10,000, she also suggested their Money Market account. "We would love to have you come in." She asked for my name and gave hers again.
Lisa	Branch 2	8/10/2005 @ 2:21	Lisa was professional and courteous. She immediately asked if I needed rates. "Is there a particular term?" After mentioning I was interested in 3-6 month range she said they had a good special on the 9 month. It was 3%. Lisa briefly put me on hold to check on another special. It required \$25,000, however.
Susan	Branch 3	7/20/2005 @ 3:12	Our conversation was quick. Susan answered, "We do have a savings account that is free if you maintain a balance of \$200." I asked what the current rate was. I inquired if they had a money market. "How much money?" She explained that it was a tiered account. "Be glad to help you, she ended."
Receptionist	Branch 3	7/25/2005 @ 10:59	Can you tell me about your CD rates? The receptionist answered the phone, "How may I direct your call?" I asked to speak with someone about CD rates. She said I would need to speak with Sheila and attempted to transfer. I got voicemail so I zeroed back out. The receptionist said I could leave a message or call back.
Dot	Branch 3	7/20/2005 @ 2:35	I'm looking for a savings account for emergency money. What do you recommend? Dot asked if it was a large amount of money. I answered, "\$7000." She talked about the Money Market and regular savings and said they were both getting the same rate. "The regular one is easier and probably best for you. It allows 3 withdrawals a month." She said there was no charge as long as I maintained \$200. Dot also mentioned having CDs. There was a 9 month special at 3%. "We have good checking accounts too." She seemed eager for my business. Good job.
Brenda	Branch 4	7/25/2005 @ 11:05	"And your name is?" Brenda asked if I had anything at the bank already and how long a term I was wanting. She talked about their 91 day CD and gave its rate as well as the 6 month and 9 month CDs. She mentioned that the 9 month required \$5000. "How much do you have?" Brenda said they had longer terms if I was interested. She asked, "Would you like me to send you some information on our other accounts?"
Deanna	Branch 4	7/20/2005 @ 2:57	Deanna asked for my name and confirmed that I was looking for a personal savings account. She mentioned that they had both youth and regular. She described opening a regular account with \$100 but maintaining a balance of \$200 to avoid a fee. She said there was also a Money Market depending on my balance. Deanna was soft spoken and nice. She talked about bringing in a driver's license and social security number if I decided to open one.
Lori	Branch 4	7/25/2005 @ 11:16	Emily transferred me to Lori. Lori seemed tired but was informative. She asked about the term and amount I was looking for. She quoted the rate and yield for the 6 month CD (since I asked about it) and then mentioned having a 9 month special. She also quoted the 12 month CD. She asked for my name and said if there was anything else she could do to let her know.