



# VBA Management Development Program

## Session Three, PRE-WORK

Facilitator: Vicki Kraai, InterAction Training\_  
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***Pre-Session Assignment: Mini-Shop of a competing bank or credit union in your market***

***Due Date: November 10th to submit the shop results with the Survey link provided in this document***

We are asking you to call a bank or credit union in your market and complete the shop form and then go to the SurveyMonkey link to upload your form information/experience.

Please review the form prior to your actual “shop” phone call to refresh yourself with what information we are asking you to capture. DO NOT let them know you are “shopping them”.

After initial greeting, say “I would like some information about your checking accounts” and then let the process take place.

Share your experience using the form(s) and then use the SurveyMonkey link to submit your answers/comments regarding your experience. The paper copies are for your use. **Completed results need to be done in Survey link to submit your answers/comments.**

Click [here](#) for Telephone Shop

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### Telephone Shop

- |  |                      |              |   |    |    |
|--|----------------------|--------------|---|----|----|
| 1. Did you shop a bank or credit union?                                    | Bank                 | Credit Union |   |    |    |
| 2. Total # of Rings:   | 1                    | 2            | 3 | 4  | 5+ |
| 3. Total # of Transfers:   | 0                    | 1            | 2 | 3+ |    |
| 4. "On hold" time (if any):  | <input type="text"/> |              |   |    |    |
| 5. Did the employee identify the bank and/or their department?             | Y                    | N            |   |    |    |
| 6. Did the employee identify him/herself by name?                          | Y                    | N            |   |    |    |
| 7. Did the employee use a pleasant tone of voice throughout the call?      | Y                    | N            |   |    |    |
| 8. What words would you use to describe your first impression?             | Y                    | N            |   |    |    |
| 9. Did the employee have a good understanding of the products or services? | Y                    | N            |   |    |    |
| 10. Did the employee ask questions to determine the best account for you?  | Y                    | N            |   |    |    |
| 11. Did the employee answer your questions to your satisfaction?           | Y                    | N            |   |    |    |

12. Did the employee offer any incentives or reasons to open a checking account with their bank? Y N
13. Did you feel that the employee was listening and responding to your needs? Y N

14. What was positive about the experience?

15. What was negative about the experience?

16. Next steps – did they leave you with options/follow-up? Y N

17. Lasting impression of the experience?

Please go to the survey link provided and upload the answers!