 VBA Management Development Program

**Session**

**, PRE-WORK**

**Facilitator: Vicki Kraai, VK Solutions, LLC** **vicki@vksolutionsllc.com**

***Pre-Session Assignment: Mini-Shop of a competing bank or credit union in your market***

***Due Date: November 2 *** ***SurveyMonkey link ***

# 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 SurveyMonkey to submit your answers/comments.**

# ***Click*** [***here***](https://www.surveymonkey.com/r/VBAShopForm) ***for Telephone Shop***

 Telephone Shop

1. Did you shop a bank or credit union? Bank Credit Union
2. Total # of Rings:

1 2 3 4 5+

1. Total # of Transfers:

1 2 3+

1. “On hold” time (if any):

|  |  |  |
| --- | --- | --- |
| 5. Did the employee identify the bank and/ortheir 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 |

1. Did the employee ask questions to determine the

best account for you? Y N

1. Did the employee answer your questions to your

satisfaction? Y N

1. Did the employee offer any incentives or reasons to

open a checking account with their bank? Y N

1. Did you feel that the employee was listening and

responding to your needs? Y N

1. What was positive about the experience?
2. What was negative about the experience?
3. Next steps – did they leave you with options/follow-up? Y N
4. Lasting impression of the experience?