



# VBA Management Development Program

## Session Three, PRE-WORK

Facilitator: Vicki Kraai, InterAction Training\_  
[vicki@interaction-training.com](mailto:vicki@interaction-training.com)

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

***Due Date: NOVEMBER 10<sup>th</sup>*** to submit the shop results with the survey link provided in this document – one Link for in-person and one link for telephone (whichever you decide to do).

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

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

Look over both forms (telephone and in-person) for you to decide which one you intend to do and then follow the leads on the template provided.

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

**Click here for In-person Shop results to post**

[VBA-MDP \(In-Person Shop 2022\)](#)

**OR Click here for Phone Shop results to post**

[VBA-MDP \(Phone Shop 2022\)](#)

## Telephone Shop

- |  | Bank                 |   |   | Credit Union |    |
|--|----------------------|---|---|--------------|----|
| 1. Did you shop a bank or 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?

## In-person Shop

1. Did you shop a bank or credit union?

Bank

Credit Union

After being acknowledged and helped, say, "I would like some information about your checking accounts." Don't lead the employee.

Notes: Don't be in a hurry. Stay if employees are willing to talk with you. Don't take this worksheet in with you. Wait and complete this worksheet in your car immediately after you've completed the shop.

### Greeting

Yes No

Greeting	Yes	No
Were you greeted promptly (eye contact?) ?		
Were you greeted in a professional manner?		
Was the greeting friendly?		
Please describe your first impression after you were greeted and helped.		

**Sales Presentation****Yes No**

Did the employee have a good understanding of the products or services?	<input type="checkbox"/>	<input type="checkbox"/>
Did the employee ask questions to determine the best account for you?	<input type="checkbox"/>	<input type="checkbox"/>
Did the employee answer your questions to your satisfaction?	<input type="checkbox"/>	<input type="checkbox"/>
Did the employee offer any incentives or reasons to open a checking account with their bank?	<input type="checkbox"/>	<input type="checkbox"/>
Did you feel that the employee was listening and responding to your needs?	<input type="checkbox"/>	<input type="checkbox"/>
What was positive about the experience?		
What was negative about the experience?		
Next Steps – did they leave you with options/follow-up/website to review products further?	<input type="checkbox"/>	<input type="checkbox"/>
Lasting Impression of the Experience?		