

BANK * SECRET SHOPPER EVALUATION

Bank Name: _____

Branch Location: _____

Date/Time of visit: _____

Name of Bank Associate/Assistant: _____

Please rate the service you received for each of the items listed. When rating each item, use the following as your scale: 1 = Poor to 5 = Excellent

Item/Description **Rating (circle one)**

Branch Facilities

- | | | | | | |
|--|---|---|---|---|---|
| 1. Did the outside appear to be clean? (sidewalks, windows, doors) | 1 | 2 | 3 | 4 | 5 |
| 2. Efficient, no wait service? | 1 | 2 | 3 | 4 | 5 |
| 3. No long lines at the counter? | 1 | 2 | 3 | 4 | 5 |
| 4. Availability of information brochures? | 1 | 2 | 3 | 4 | 5 |
| 5. Pleasant and attractive décor? | 1 | 2 | 3 | 4 | 5 |
| 6. Automatic bank machines in convenient locations? | 1 | 2 | 3 | 4 | 5 |

Customer Service Representatives/Tellers

- | | | | | | |
|--|---|---|---|---|---|
| 1. Friendly and courteous manner? | 1 | 2 | 3 | 4 | 5 |
| 2. Knowledge of bank's products and services? | 1 | 2 | 3 | 4 | 5 |
| 3. Willingness to listen and respond to your need? | 1 | 2 | 3 | 4 | 5 |
| 4. Fast and efficient service? | 1 | 2 | 3 | 4 | 5 |
| 5. Recognition of you as a valued customer? | 1 | 2 | 3 | 4 | 5 |
| 6. Professional and attractive appearance? | 1 | 2 | 3 | 4 | 5 |

Supervisors/Management

- | | | | | | |
|---|---|---|---|---|---|
| 1. Friendly and courteous manner? | 1 | 2 | 3 | 4 | 5 |
| 2. Knowledge of bank's products and services? | 1 | 2 | 3 | 4 | 5 |
| 3. Willingness to listen and respond to your needs? | 1 | 2 | 3 | 4 | 5 |
| 4. Fast and efficient service? | 1 | 2 | 3 | 4 | 5 |
| 5. Recognition of you as a valued customer? | 1 | 2 | 3 | 4 | 5 |
| 6. Professional and attractive appearance? | 1 | 2 | 3 | 4 | 5 |
| 7. Available to customers when needed? | 1 | 2 | 3 | 4 | 5 |

Miscellaneous

- | | | | | | |
|--|---|---|---|---|---|
| 1. Was the overall experience enjoyable? | 1 | 2 | 3 | 4 | 5 |
| 2. Were the hours convenient? | 1 | 2 | 3 | 4 | 5 |

Total Score: _____

Your name: _____

Approximate time spent: _____

DRAFT