Sample Survey Questions

Closed Loop Feedback

PeopleMetrics®

GROWTH DISCIPLINES · UNDERSTANDING · DECISION MAKING · GOALS · FEEDBACK

PeopleMetrics

Closed Loop Feedback Survey
Branch Transactions

To: [Bank ABC] Branch Visit Customers
From: [Bank ABC] (research@people-metrics.com)
Subject: How Did We Do?

Dear [Customer Name],

Thank you for visiting [Bank ABC] on [[DATE OF VISIT]]. At [Bank ABC], we are dedicated to meeting our customers' needs in an efficient and friendly manner; hopefully your recent visit exceeded your expectations. I invite you to participate in a short survey to voice your opinion on how [Bank ABC] is delivering customer service and what we can do to improve it.

The survey will not ask for any sensitive personal information, such as account details or social security numbers. At the end of the survey, you will be given the option to allow [Bank ABC] to follow-up with you regarding your survey responses. Your responses will not be shared with parties outside of [Bank ABC] and those needed to conduct the survey.

The survey will take less than five minutes to complete. To participate in the survey, please begin by answering the following question:

> Thinking about your overall relationship with [Bank ABC] , how likely are you to recommend the bank to family, friends, and/or colleagues? Please use a scale of 0 to 10, with 0 being Not At All Likely and 10 being Extremely Likely.

O 0 – Not At All Likely
O 1
O 2
O 3
O 4
O 5
O 6
O 7
O 8
O 9
O 10 – Extremely Likely

If you have any questions regarding the survey, please contact us at customervoice@bankabc.com.

Thank you for your participation. You are a valued customer to [Bank ABC] and we look forward to the continued opportunity to serve you.

Sincerely,

[[BRANCH OR REGIONAL MANAGER NAME]]
[[BRANCH OR REGIONAL MANAGER TITLE]]
[Bank ABC] Bank

OPT OUT TEXT GOES HERE

2. Specifically referring to your likelihood to recommend rating, why did you give [Bank ABC] this rating?

Characters Remaining: #### (max 2000)

Top of mind explanation re: NPS

Generates Market Alert

[IF Q 1 = 9 OR 10 AND Q2 = >3 CHARACTERS GENERATE A MARKET ALERT]

For the rest of this survey, please think about your [[most recent branch visit]] OR [[recently completed mortgage experience]].

Customer Effort Score

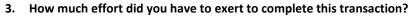3. **How much effort did you have to exert to complete this transaction?**
    a. Less than expected [Skip to Q5]
    b. As much as expected [Skip to Q5]
    c. More than expected

If C, generate Recover Alert

4. Please tell us why you gave that rating.

Characters Remaining: #### (max 2000)

Explain Effort Issues

At-Risk Management [RECOVER ALERT]

5. During your [[most recent branch visit]] OR [[recently completed mortgage experience]], did you experience a specific problem or issue?
   a. Yes
   b. No [Skip to Q11]

[If Q5=Yes]

Generates Problem Alert

6. Please select the area(s) that best describe your problem or issue:
   a. Appearance / cleanliness of the branch / drive up
   b. Branch/ drive up hours
   c. Branch / drive up location
   d. Decision made by [Bank ABC] Bank
   e. Employee demeanor(in branch or at the drive up)
   f. Employee knowledge (in branch or at the drive up)
   g. Error in banking process
   h. Issue with account / address change
   i. Process was lengthy/disorganized
   j. Product does not meet needs
   k. Wait / transaction time
   l. Other [specify]

Identify and track most common problem areas

7. Please describe your problem in detail.
   [Open Ended Response]

8. Were you in contact with anyone at [Bank ABC] about your problem?
   a. Yes
   b. No

Gather detail on the issue in customer's own words

9. Does your problem remain unresolved?
   a. Yes [Skip to Q11]
   b. No [Ask Q10]

10. Please tell us if you agree or disagree that you are satisfied with the way in which your problem was resolved.
    a. Overall, I am satisfied with the way my problem was resolved *(Strongly Disagree to Strongly Agree)*

Service Excellence [RECOGNITION ALERT]

11. During your [[most recent branch visit]] OR [[recently completed mortgage experience]] was there an employee or employees who went above and beyond to meet your needs?
    a. Yes
    b. No [Skip to Q14]

Generates Recognition Alert

[If Q11=Yes]
12. Please tell us the name of the [Bank ABC] employee(s) who went above and beyond for you.

13. What did this person do to go above and beyond for you? Somebody from [Bank ABC] will personally follow up with this person/people to share your feedback.
    [Open Ended Response]

Mine for best practices & recognize employees

Improvement Opportunities [IMPROVE ALERTS]

> **Generates Improvement Alert**

14. Is there anything [Bank ABC] could do differently/better to contribute more value to your experience?
    a. Yes
    b. No [Skip to Q16]

> Understand customer's polite complaints

15. What could [Bank ABC] do differently/better?
    [Open Ended Response]

Additional Services [Grow Alert]

16. Which of the following would you like to learn more about? *[Programming note: multi-select]*

> **Generates Grow Alert**

    a. Spend less
    b. Save more
    c. Manage debt
    d. Buy what you want (car, house, etc.)
    e. Save for unplanned events
    f. Save for retirement
    g. Save for something special
    h. Save for education
    i. Protect my identity or accounts
    j. Protect my family
    k. Leave something to my family
    l. Other (please specify)
    m. None of the above

[Programming Note: IF QLearn = None of the above, show QContact;If QLearn = any other response, skip to QPhone + QEmail + QOther]

Closing

Thank you. That was the last of our questions about your experiences with [Bank ABC].

17. May a [Bank ABC] representative contact you about your survey responses?

> **Closing the Survey**

    a. Yes [Go to Q18]
    b. No [Go to Thank you Screen]

18. What is the best method for them to contact you?
    a. a. Phone [include text boxes for write-in]
    b. b. Email [include text boxes for write-in]
    c. c. Other (please specify

Thank you Screen

Your feedback is extremely valuable to [Bank ABC].
Thank you for taking the time to share your views and experiences.

[Programming Note: Redirect completed surveys to www.[Bank ABC].com]