

Bank Employee Performance Evaluation

**Answer the following questions,
either Yes or No!**

		YES	NO
1.	Have you Mystery Shopped your employees in the last 6 months?		
2.	Annually - Do you receive documented feedback from 10% of your customers on how they feel about your bank?		
3.	Do you have a formal strategy to train <u>new</u> employees how to deliver exceptional experiences for your customers?		
4.	Do you have a formal strategy to assure <u>all</u> employees deliver exceptional experiences for your customers?		
5.	Do you know the average Services-per-Household in your bank?		
6.	Do you know the annual customer defection rate?		
7.	Are 50% or more of all employees earning an incentive annually for helping customers fulfill needs above those requested?		
8.	Does your bank have an annual awards banquet for Customer Experience Successes?		
9.	Do <u>all</u> employees have a working knowledge of all of the banks products and services?		
10.	Do Business Development personnel have a formal strategy for improving sales skills and coaching development?		

Grade:

9 - 10 “Yes” – Excellent – Your bank exceeds 90% of your competitors

6 - 8 “Yes” – Needs Help – Good start

3 - 6 “Yes” – Needs Lots of Help – Good intent

0 - 2 “Yes” – Call Now!

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