

Mystery Shopping Questionnaire For Banks

General Information:

- Date of Visit: _____
- Branch Location: _____
- Time of Visit: _____

Physical Appearance & Environment:

1. Was the exterior of the bank clean and well-maintained?

- Yes
 No

Comments: _____

2. Was the signage clear and visible from the street?

- Yes
 No

Comments: _____

3. How would you rate the cleanliness and tidiness of the interior?

- Excellent
 Good
 Average
 Poor

Comments: _____

4. Were the promotional materials for banking services/products visibly displayed and easy to understand?

- Yes
 No

Comments: _____

Customer Service:

1. Were you greeted upon entering?

Yes

No

Comments: _____

2. How long did you wait before being assisted?

Immediately

Less than 5 minutes

5-10 minutes

More than 10 minutes

Comments: _____

3. How would you rate the employee's product knowledge?

Excellent

Good

Average

Poor

Comments: _____

4. Did the employee ask questions to better understand your needs?

Yes

No

Comments: _____

5. Were you offered any additional products or services?

Yes

No

If yes, please specify: _____

Transactions & Services:

1. If you inquired about a product/service, were the explanations clear and understandable?

- Yes
- No

Comments: _____

2. Were you informed about the fees associated with the product/service?

- Yes
- No

Comments: _____

3. How would you rate the efficiency of the transaction process?

- Excellent
- Good
- Average
- Poor

Comments: _____

Overall Experience:

1. Based on your visit, how likely are you to recommend this bank to a friend or family member?

- Very Likely
- Likely
- Unlikely
- Very Unlikely

Comments: _____

2. What was the highlight of your visit?

Comments: _____

3. What areas do you think require improvement?

Comments: _____