

(SAMPLE) SURVEY

1. Mobile App Self-Service Features were discussed by the FI Representative

- (a) Did the rep discuss any self-service features on the mobile app? Yes or No
- If so which of the following, did they discuss?
- | | |
|--|--|
| <input type="checkbox"/> Set up another bank account | <input type="checkbox"/> Order copies of cheques |
| <input type="checkbox"/> Fill out forms | <input type="checkbox"/> View credit card, loan or mortgage balances |
| <input type="checkbox"/> Report or lock lost debit or credit cards | <input type="checkbox"/> Automatic approve loans or mortgages |

2. What was their response to these Mystery Shopper's Questions:

(a) "What payment options such as PayPal, Venmo or Apple Pay do you offer?"

(b) "Besides YouTube and LinkedIn, what other social platforms does your financial institution have a presence on?"

(c) "How is your financial institution transparent in fee disclosure?"

(d) "What about using customer banking information for marketing purposes – is this something you do?"

(e) "What investment workshops, webinars, and other educational support do you provide?"

(f) "Besides cash bonuses, cash backs, and reward points, what other credit card incentives do you offer?"

(g) "How are your profits used to support humanitarian causes?"

3. Your Impressions

(a) In a real situation, would you join this financial institution based on your shop experience? Yes or No
Why/why not?

(b) On a scale of 0 (not at all) to 10 (absolutely), how likely would you to recommend this FI to other millennials?
