

# MYSTERY SHOPPER DIRECT<sup>SM</sup>

## Measure Frontline Sales and Service Skills

- 50+ standard evaluation points are measured per shop
- Fully customizable based on current standards at your institution
- Developed solely for the banking industry
- Competitor shop comparisons are also available

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### Optimize In-Branch Opportunities

Training branch staff and measuring in-branch performance can make a world of difference to the overall success of your institution. There is no better strategy for analyzing your sales and service culture and optimizing in-branch opportunities than with Mystery Shopper Direct<sup>SM</sup>.

### Customized Branch Shopping

Stellar Strategic offers a complete branch shopping program to give you a detailed analysis of how well your institution integrates sales and service standards into everyday behavior. Utilizing our 50 standard evaluation points, we cover an extensive range of in-branch experiences. We can customize the Mystery Shopper Direct<sup>SM</sup> program based on your current internal training programs. Plus, it's an extremely effective follow-up strategy when implementing Stellar Strategic's Deposit Direct<sup>SM</sup> program.

Traditional mystery shopping programs may not be tailored for financial institutions. Our Mystery Shopper Direct<sup>SM</sup> consultants are financial service and marketing research experts who can recognize sales and service issues. Additionally, we guarantee a fair and accurate mystery shop of each branch.

### Retraining Services

After all shopping data has been collected, a detailed analysis will be compiled at the branch and institution level providing a complete picture of strengths and weaknesses of the branch network. Once the analysis has been completed, Stellar Strategic can create customized training workshops focused on those areas needing improvement. The retraining workshops focus heavily on role-playing and interactive coaching of participants.

For optimal results, Mystery Shopper Direct<sup>SM</sup> can be implemented annually or quarterly to track and measure your future sales and service efforts at each branch.

### Categories of Evaluation:

- branch appearance/location
- lobby appearance
- welcome greeting and introduction
- recognizing sales opportunities
- consumer interviews
- handling objections
- asking for the business/closing
- product and service knowledge
- cross-sell opportunities
- account representative critique
- overall in-branch experience
- compliance and disclosure
- teller interaction and service
- call center interviews

