

Job Match Survey

*Teller Assessment Program—Enhanced for Sales
Teller Structured Employment Interview*

Dear Participant,

This survey is being used to determine the key work activities and skills required to effectively perform the teller position in your organization. **The information you provide will be used for research purposes only and will remain confidential.** Information on this survey will be reported to Employment Technologies Corporation, a human resources firm. The survey will not be retained in any personnel file and should not be confused with any official personnel documents.

The survey will take approximately 5 to 10 minutes to complete. Once you have completed the survey, please return it to your administrator.

Thank you for your participation.

Please check the box below that best describes your job:

- Teller
- Supervisor of Teller
- Other (please specify) _____



Instructions: Please read each statement below. Check the box that best describes how essential the activity is to overall job performance in the Teller position.

<u>Work Activity</u>	<u>Essential</u>	<u>Somewhat Essential</u>	<u>Not Essential</u>
1. Examines checks to ensure standards are met prior to cashing (e.g., properly endorsed, written amount corresponds with numerical amount correct date).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Keeps security of assigned work area (e.g., places cash in teller drawer, locks all drawers when leaving area).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Records the exchange of bills (e.g., 5's, 10's, 20's, 50's) when cashing checks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Identified mutilated or counterfeit money.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Notifies other tellers and/or bank officers when a situation poses a potential risk or when a customer is acting suspicious (e.g., large currency transaction, suspicious activity).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Requests identification from customers as required.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Greets customers in a pleasant, friendly way (e.g., uses their name in casual conversation).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Explains bank policies and procedures to customers (e.g., proper check endorsement, need for identification, holds on checks) to customers as necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Recognizes and assesses sales opportunities and refers customer to Customer Service and/or Bank Officer when necessary (e.g., approvals, sales referrals, explanation of services of policies).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Describes briefly or answers questions regarding bank products/services in an efficient and courteous manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Receives payment and issues money orders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Requests supervisor's signature on cashier's checks as necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Correctly uses and/or maintains files and documents (e.g., signature cards, policy memos, transaction reports).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Asks supervisor for assistance when dealing with out of the ordinary/unfamiliar customer requests.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Uses and understand bank policy for service charges, bank fees, account holds and embargoes, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



<u>Work Activity</u>	<u>Essential</u>	<u>Somewhat Essential</u>	<u>Not Essential</u>
16. Reads notices such as branch schedules, procedural changes, robbery notices, teller awards, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Attends training and meetings to learn new policies, procedures, and compliance issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Requests approval signature from person with higher check cashing limit, when necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Listens to customer comments and suggests other products and services making referrals appropriately.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Understands the general types of bank products and learns about new products and features to increase sales/referrals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Completes required paperwork and/or documentation according to established policies and procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Buys and sells cash to and from tellers in branch.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Sells coins to customers and other tellers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Accurately performs basic mathematical calculations, (e.g., counts, adds, subtracts, multiplies, divides).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Balances cash drawer at end of day (e.g., assigned drawer, branch, etc.) according to established policies and procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Balances manually (i.e., when teller terminal is not working).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. Delivers negative information (e.g., overdrawn accounts) in a tactful manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. Adjusts work speed according to banking office workload (e.g., during peak hours).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. Expresses appreciation for customers' business (e.g., thank you, follow-up call).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. Assists other tellers (e.g., explaining unusual transactions, answering questions).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31. Apologizes when necessary (e.g., long waits, errors).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Instructions: Please read the definition for each skill listed below. Check the box that best describes how essential the skill is to overall job performance in the Teller position.

<u>Skill</u>	<u>Essential</u>	<u>Somewhat Essential</u>	<u>Not Essential</u>
Ability to Learn and Apply Procedures: Comprehending new job-related information in a timely manner and correctly recalling and applying that information to work tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attention to Detail: Observing important detail while performing work tasks; completing work tasks without error; remaining focused and detail-oriented while working long hours or under stress.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Focus: Interacting with customers in a professional manner by greeting customers, building rapport, and maintaining trust; meeting customer needs and ensuring customer satisfaction and loyalty.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Focus: Identifying customer needs for bank products and services, matching products and services to those needs, and responding persuasively to customer questions and objections.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Math Orientation: Correctly performing mathematical computations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flexibility: Adapting to stressful conditions while maintaining composure and quality of work; adapting work speed and processes to accommodate workload and customer volume; adapting the style and pace of interactions according to customer conditions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Ethic: Demonstrating a strong desire to contribute to the organization; behaving in an ethical and trustworthy manner; demonstrating reliable and dependable behavior that contributes to the organization's image; taking initiative on work tasks and responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication: Expressing information in a clear and concise manner without rambling; speaking in a pleasant tone and volume; using effective voice inflection and enthusiasm; using correct vocabulary, grammar, and sentence structure.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please check the box that best describes the percentage of the Teller job covered by the skills listed above.

- 0 to 20%
- 21 to 40%
- 41 to 60%
- 61 to 80%
- 81 to 100%