

Job Match Survey

Teller Vision and 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. Greets customers in a pleasant, friendly manner and uses their name in casual conversation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Apologizes to customers when necessary (for long waits, errors, etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Enters customer account numbers into the computer system to process transactions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Processes account transactions, including deposits, withdrawals, transfers, and loan payments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Cashes checks, ensuring that all requirements are met prior to check cashing (such as identification verified, written amount corresponds to numerical amount, signature is authentic).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Issues cashier's checks, money orders, and/or travelers checks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Processes cash advances on bank-issued credit cards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Fills change orders to exchange cash and currency.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Uses and understands bank policies for service charges, bank fees, account holds, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Explains bank policies and procedures to customers as necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Requests identification from customers as required.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Verifies the authenticity of signatures when required.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Requests approval signatures from supervisors or Senior Tellers as necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Assists customers with questions about their accounts (such as looking up account status, placing research requests, etc.) or refers them to appropriate bank associates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Delivers negative information (such as an overdrawn account) to customers in a professional and tactful manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Identifies customers' needs by speaking with customers and/or by reviewing their account histories.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



<u>Work Activity</u>	<u>Essential</u>	<u>Somewhat Essential</u>	<u>Not Essential</u>
17. Suggests bank products and services to customers based on the customer's specific needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Explains the features and benefits of products or services to customers so they can make informed purchasing decisions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Refers customers to other bank associates when appropriate to assist the customer with additional banking needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Helps customers complete necessary paperwork to obtain bank products or refers them to other bank associates for help.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Keeps assigned work area secure by locking all drawers when leaving area, maintaining appropriate amount of cash in drawers, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Sells and buys money to/from the vault.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Notifies other Tellers and/or Bank Officers when a situation poses a potential risk or when a customer is acting suspiciously.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Opens night deposit bags and processes transactions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Collects proof work and bundles it for pick-up.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Completes required paperwork to document customer transactions and work activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. Balances drawer and follows appropriate procedures to resolve out-of-balance situations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. Answers phones promptly and courteously.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. Informs customers if there are problems with a transaction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. Expresses appreciation for customers' business.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31. Learns about bank product and service offerings, including features, benefits, and potential customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32. Assists other Tellers as necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33. Learns additional duties in order to assist and/or fill in for other bank personnel, if requested.	<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, and remaining focused and detail-oriented during less than ideal conditions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Focus: Interacting with customers in a pleasant and professional manner, building rapport, 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"/>
Cash Handling/Balancing: Understanding and applying basic math concepts (e.g., accurately receiving and distributing money; identifying and resolving balancing errors).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teamwork: Working effectively as a team member to meet customer needs, and proactively helping other bank personnel to complete tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication: Expressing information in a clear and concise manner; speaking in a pleasant and enthusiastic tone; using correct vocabulary and grammar.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Ethic: Demonstrating a strong desire to contribute to the organization; taking initiative on work tasks and responsibilities; behaving in an ethical and trustworthy manner.	<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%