



The Frontline Cross-Selling Confidence Survey

Measuring banker readiness to identify opportunities and start conversations

Estimated time: Approximately 5–8 minutes.

Instructions: Read each statement and circle the response that best reflects your experience.

Confidentiality: All responses are collected anonymously. No individual data will be shared.

Purpose of this survey

This survey is designed to help us understand how confident frontline bankers feel when it comes to cross-selling skills like having natural customer conversations, spotting product opportunities, and applying the training they've received. Responses are anonymous.

Rating scale: **1** Strongly Disagree **2** Disagree **3** Neutral **4** Agree **5** Strongly Agree

SECTION A — CUSTOMER CONVERSATIONS

1 | I feel comfortable initiating conversations with customers about products and services beyond their primary reason for visiting.

1 2 3 4 5

2 | I am confident in my ability to listen for cues in customer conversations that signal an opportunity to introduce a relevant product or service.

1 2 3 4 5

3 | I feel at ease transitioning a routine service interaction into a cross-selling conversation without it feeling forced or awkward.

1 2 3 4 5

SECTION B — SPOTTING OPPORTUNITIES

4 | I can confidently identify which products or services are most relevant to a customer based on their financial situation or life stage.

1 2 3 4 5

5 | I regularly notice cross-selling opportunities during customer interactions but feel uncertain about how to act on them.

1 2 3 4 5

6 | I understand how to use available customer data or tools to help identify cross-selling opportunities before or during an interaction.

1 2 3 4 5

SECTION C — TRAINING & PREPAREDNESS

7 | The training I have received has adequately prepared me to cross-sell products and services to customers confidently.

1 2 3 4 5

8 | I have received enough training on the specific products and services I am expected to promote.

1 2 3 4 5

9 | I would benefit from additional coaching, role-play practice, or job aids to feel more confident in cross-selling conversations.

Yes No Unsure

10 | Name one thing that could help boost your cross-selling confidence in conversations with customers?

Thank you for completing this survey.

Your feedback is valued and will directly inform how we develop and support our frontline teams.