



A Financial Services Alliance

INFiN Store Appearance Best Practices Store Evaluation Guide

The objective of the INFiN Store Appearance Best Practices is to foster the improvement of the industry's image by developing and promoting ways that its members can project a positive store image for their Financial Service Centers.

Using these Best Practices will help support your company's overall image in the communities you serve, project your employee's image of confidence and trustworthiness, and communicate respect and courtesy to your customers.

This Guide is a self-evaluation tool that will assist you in objectively quantifying how well your store(s) compare to the industry's best practices. Use it to identify areas where a facility is working for you as well as where some things may be improved to perform better. It is intended to assist in establishing some consistent standards within your organization that will help improve the appearance of your facilities as well as your bottom line.

How To Use This Guide

The enclosed matrix is designed to provide a guide for you to compare your facilities against each of the Best Practices in key areas of your store(s). The scale allows you to calculate a score for each item. As you read across each item, choose a score that you think best describes the store's performance against that best practice and mark it in the box on the far right hand column. A score of 3 or higher in each area is acceptable. A score of 2 or lower indicates an area where improvement may be needed.

Be honest in your evaluations. There are no negative consequences in scoring below a 3 in any item, it is simply intended to be a tool to assist you in continually improving the appearance of your store(s) to be the best that it can be. It is a good idea to use this tool to evaluate your facilities regularly to ensure that high standards are able to be maintained.

Financial Services Center Store Appearance Self Audit

Store Name / ID _____

Date _____

Address _____

Reviewed By: _____

Legend	Excellent	You execute this so well that it could be used as an industry standard
	Good	You execute this exactly as defined
	Needs Improvement	You make an attempt at this but could do better
	Poor	You do not execute this at all

		Possible Points	1	2	3	4	
Storefront			Poor	Needs Improvement	Good	Excellent	Score
	Surface of building is clean and free of deterioration, cracks, broken fixtures. Visible attachments such as electrical boxes, conduit, security gate covers, etc. are well maintained and whenever possible integrated into to building façade to minimize visibility.						
	Windows are clean and free of cracks, tape or other unsightly coverings that obstruct visibility into the facility						
	Entrance is clear and easily accessible						
	No graffiti or other markings						
	There are no trash bags or other waste materials in front of store where it is visible to general passerby traffic						

		Possible Points	1	2	3	4	
Exterior Signage			Poor	Needs Improvement	Good	Excellent	Score
	Signage is clean, simple and easily identifies only the business name and primary services provided						
	Signs are in good working order, free of cracks, broken parts or missing characters						
	All electrical components on lighted signs are in good working order						
	Identity signage is not used as a menu of all products and services						
	General overall maintenance includes regular power washing of signage, awnings, building façade and sidewalks						

		Possible Points	1	2	3	4	
Window Displays & Graphics			Poor	Needs Improvement	Good	Excellent	Score
	Exterior window(s) utilizes a system (e.g. frames / hardware) for signage to be neatly displayed in an orderly fashion. Avoid dated or shop worn items and refresh on a regular basis						
	Signage is professionally lettered an not handwritten.						
	Signage is not be hung using tape.						
	Neon or other light box signage is organized and in working order. Visibility of unsightly wires or cords is limited or not visible.						

		Possible Points	1	2	3	4	
Flooring			Poor	Needs Improvement	Good	Excellent	Score
	Floors are clean, dry and free of trash						
	There are no broken tiles or torn carpets						
	If inclement weather conditions exist, walk-off mats are deployed to keep floors clean and dry						

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Possible Points		1	2	3	4	
Ceiling / Lighting		Poor	Needs Improvement	Good	Excellent	Score
Ceiling tiles are in good condition, clean and unstained						
All lighting fixtures are operational with all bulbs, ballasts or lenses in good repair and working order						
Lobby area lighting is bright and evenly distributed						

Possible Points		1	2	3	4	
Write-Up Counter		Poor	Needs Improvement	Good	Excellent	Score
There is an area that customers can use to sign checks, complete money transfer forms or other documents prior to or after using the queue line						
Area is free of clutter and unsolicited materials from third parties such as newspaper stacks, flyers, or other similar materials						
Relevant materials such as money transfer forms, pre-paid debit card forms or company advertisements for authorized products or services are neatly displayed and in full stock						

Possible Points		1	2	3	4	
Lobby Area / Queue Line		Poor	Needs Improvement	Good	Excellent	Score
Area is free of trash, papers and other clutter						
Lines are logical and promote order in the lobby						
Where appropriate, stanchions are used to define flow and eliminate customer confusion						

Possible Points		1	2	3	4	
Waste Management		Poor	Needs Improvement	Good	Excellent	Score
Trash bins are accessible to customers at all transaction points						
Trash receptacles are integrated into the interior design of the store.						
Store does not have metal trash cans or receptacles with visible plastic bags.						
There are no trash bags in the customer areas or mantraps where they can create offensive odors or an eyesore.						

Possible Points		1	2	3	4	
Interior Displays & Graphics		Poor	Needs Improvement	Good	Excellent	Score
Menu boards are used to display the full compliment of products and services available as well as relevant pricing that reinforces the transparency of fees associated with FSCs.						
Wall signage and posters are hung in a neat and orderly fashion.						
Tape is not used to hang posters and signs						
Signs are refreshed on a regular basis to remove worn, torn or tattered items.						
Framing or retail hardware hanging systems are used to manage this process						

Possible Points		1	2	3	4	
Teller Window		Poor	Needs Improvement	Good	Excellent	Score
This area is free of clutter						
Tellers do not keep handwritten signs or notes in an area visible to customers						
Extraneous materials such as papers and office products are not in customer view						
A professional image is presented at the primary point of transaction. If personal materials such as photos, religious paraphernalia, holiday decorations are permitted in the workplace, they are not posted within the view of the customer.						

Financial Services Center Store Appearance Self Audit

Possible Points		1	2	3	4	
Employee Area		Poor	Needs Improvement	Good	Excellent	Score
Employee area is maintained in a manner consistent with the rest of the store and conveys a positive image						
This area is free of clutter. Storage of materials is in enclosed containers, cabinets or drawers not visible to the customer.						
Papers and materials are filed and not piled on countertops and work surfaces						
Cartons, cleaning materials and other extraneous items are stored so as to not be visible to the customer						
Wall surface behind the transaction window is prime promotional space and are handled in similar manner to the display walls in the lobby						
Employee area lighting behind counter is bright and evenly distributed						

Possible Points		1	2	3	4	
Employee Appearance		Poor	Needs Improvement	Good	Excellent	Score
An employee's appearance projects an image that supports the company's customer service and business objectives						
Clothing reflects a sense of professionalism that would be considered appropriate for a business environment						
Employees do not wear clothing that would be typically worn for exercise or any other such leisure activity						
Any clothing with words or pictures that may be offensive to customers or other employees are not permitted to be worn in the workplace						
Clothing is be in wrinkled, dirty or in poor condition						
Styles for hair, jewelry, makeup and other personal items are workplace appropriate						
Employees adhere to good grooming and personal hygiene practices						