

FDIC Mobile Financial Services Phases 3 and 4 Interview Criteria

Once an initial contact is made with a financial industry professional, a Rockbridge interviewer will ensure the participant meets the following list of criteria before an interview is scheduled. If the criteria are not met, Rockbridge will ask the individual for a referral within the organization.

SCREENING QUESTIONNAIRE/SCRIPT

IF NEEDED FOR GATEKEEPER: Hello, may I please speak to _____? I am following up about a letter that was sent to Mr./Mrs. _____ from the FDIC.

WHEN RIGHT PERSON IS REACHED: My name is _____ calling from Rockbridge Associates. You should have received a letter telling you about a research effort we are working on with the FDIC.

The goal of the study is to better understand the ability of mobile financial services to increase access to banking services among underserved and low-income consumers. We would like to schedule a 30-45 minute phone interview with you as someone who has important insights on these topics. The interview can be scheduled anytime between November 16 and December 4. We will proceed pending anticipated OMB approval. (IF NEEDED: Unfortunately we cannot schedule the interview for before November 16 as OMB approval is pending until that time).

To make sure the interview will be applicable and interesting to you I'd like to get a better sense of your current job functions.

1. What is your current title? Can you briefly describe your current day-to-day responsibilities? (OPEN-ENDED)
2. To confirm, which of the following, if any, would you say are part of your day-to-day job responsibilities? (AT LEAST ONE, PREFER 2 OR MORE. IF NONE, ASK Q3)
 1. Mobile financial services strategies
 2. Mobile financial services marketing
 3. Responsibility for new product development related to financial services
 4. Retail operations
 5. Underserved (low-income/subprime) consumer strategy
 6. Underserved (low-income/subprime) consumer marketing
 7. Responsibility for growing the underserved (low-income/subprime) customer base
3. IF CONTACT IS NOT THE RIGHT PERSON: Can you refer someone within your organization who has insight into mobile financial services and/or underserved consumer strategy and marketing for your organization?

RECORD NAME AND CONTACT INFORMATION.

SCHEDULE INTERVIEW USING GENBOOK. What is the best date and time for you to participate in this interview?

As part of the interview, we'd like to discuss some findings of our consumer research on this topic. I'd like to send you a summary of those findings ahead of time for you to review. What is the best email address to send that document to? RECORD EMAIL _____

Thank you. You will receive an email confirmation of the phone interview and the consumer research findings shortly.