Klarstig

Financial Services Employee Experience Questionnaire

FICTIONAL EXAMPLE FOR ILLUSTRATION. NAMES, ADDRESSES AND NUMBERS ARE INVENTED.

Describe your needs and experience so the receiving team can understand priorities and plan the next step. Use examples where possible.

Contact and reference

Organization using this document

Maple Street Community Center

Your name or contact reference

Optional. Leave blank if you do not want to identify yourself in this local draft.

Alex Rivera

Email for a reply if needed

alex.rivera@example.com

Information for this document

How do you handle this today *

(Free-text answer - not filled in for this example)

What is your most important need *

(Free-text answer - not filled in for this example)

What makes this difficult *

(Free-text answer - not filled in for this example)

What would a successful outcome look like *

Reach more local families this year and support a youth reading program with visible community results.

How often does this arise

Weekly

Which change would help most

(Free-text answer - not filled in for this example)

Specific details

Stage of the employee experience

Complete when relevant to this request.

Three years sorting donations and running intake at a food pantry. Current first-aid certificate. Comfortable with spreadsheets and speaking with the public.

Tools support and communication that help or hinder your work

Three years sorting donations and running intake at a food pantry. Current first-aid certificate. Comfortable with spreadsheets and speaking with the public.

Operating context

Service area and case reference

Complete when relevant to this request.

Operations

Authorized reviewer supporting information and handling restrictions

(Free-text answer - not filled in for this example)

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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