

Reason for Action
Alert: Threaten to
withdraw funds



NO ACTION NEEDED



Civic Center
TELLER Experience

Teller customer experience survey

Employee: [REDACTED]	Contact requested? No
Transaction date: 12/03/2025	Preferred contact: Not Applicable
Survey date: 12/05/2025	Customer on record:
Survey method: Online	Email on record: [REDACTED]
Perfect score? No	Phone on record: [REDACTED]
WOW? No	Survey taker: [REDACTED]
Index score: 87.5%	

How likely are you to recommend us to others? (1-"Not At All Likely" to 7-"Extremely likely")	3
Rate us on being convenient and easy to bank with. (1-"Poor" to 7-"Excellent")	2

How satisfied are you with the service you received? (1-"Not At All Satisfied" to 7-"Extremely Satisfied")	7-Extremely Satisfied
Was the wait time acceptable to you?	Yes

Did the person who helped you...

Greet you pleasantly?	Yes
Use your name?	Yes
Discuss other services or solutions that may benefit you?	No

Please rate the person who helped you on the following...(1 "Poor" to 7-"Excellent")

Being genuinely interested in helping you	7-Excellent
Being knowledgeable	7-Excellent
Making you feel they value your business	7-Excellent

How was your transaction conducted?	With a teller, inside the branch
What prompted your visit to the branch?	
Conduct a transaction on my account	

In the next six months...

What do you anticipate doing?	
Start a home remodel or improvement project; Purchase a car or other vehicle; Invest for retirement/college savings/another purpose; Purchase or refinance a home	
Would you like someone to contact you about your upcoming need(s)?	No

Although the personnel and staff at BankPlus have always been great, I am disappointed in BankPlus. When I opened my accounts at BankPlus, there were an abundance of branches, they were open extended hours during the week and on weekends, and they were the bank that went above and beyond the norm. Sadly, this is no longer the case. BankPlus has become just another bank, with bankers hours that are not convenient for me. The branches that were always open and nearby are closing and it seems that they no longer put in effort to set themselves apart. After all the things that used to set it apart, it's become just another bank. My local branch is set to close in a few days, and I'm ready to find a new bank that provides service the way BankPlus used to do.

Comment Date	User	Message

Date	User	Action Taken
12/9/2025, 2:01:17 PM		Alert #244310: No action needed
12/8/2025, 8:02:17 AM	avannis	Alert #244310: Alert loaded: Threaten to withdraw funds

Index score: Indexes are based on questions contained in the Overall Service Delivery and Team Member Service Delivery sections only where 1 point is received for every "Yes" answer or when a score of 6 or 7 is given. A total of 8 points are possible for this survey.

Perfect Score: A perfect score is achieved when all scores in the Overall Banking Relationship, Overall Service Delivery and Team Member Service Delivery sections are either a "Yes" or a rating of 6 or 7.

WOW: A WOW is achieved when a customer makes a positive comment about an employee by name.

Action Alert: An Action Alert is triggered when a customer 1) threatens to withdraw funds or leave the bank, 2) has an unresolved issue, 3) gives a satisfaction rating of 4 or lower, or 4) requests a contact.