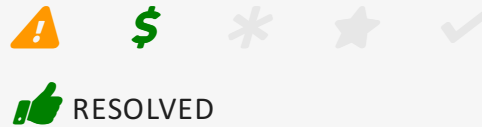


Reason for Action
Alert: Wants to be
contacted



Jackson Street
CONSUMER PULSE
Experience

Consumer Pulse customer service survey

Survey date: 01/10/2025	Contact requested? Yes
Survey method: Online	Preferred contact: [REDACTED]
Perfect Score: No	Customer on record: [REDACTED]
WOW? No	Email on record: [REDACTED]
Survey taker: [REDACTED]	Phone on record: [REDACTED]

Overall Banking Relationship	Answers
How likely are you to recommend us to others? (1-"Not At All Likely" to 7-"Extremely Likely")	4
Rate us on being convenient and easy to bank with. (1-"Poor" to 7-"Excellent")	1-Poor

Overall Service Delivery	Answers
Over the past 6 months, how satisfied have you been with the service you have received? (1-"Not At All Satisfied" to 7-"Extremely Satisfied")	2

Overall Banking Relationship	Answers
Please rate us on the following...(1-"Poor" to 7-"Excellent")	
Treating you like a person, not a number	3
Keeping your money safe and secure	6
Providing competitive interest rates and fees	2
Being flexible and working with your situation	1-Poor
Offering a competitive online banking tool	2
Proactively telling you about services that may benefit you	1-Poor

Competition	Answers
Do you bank with another financial institution besides us?	Yes
If YES, What is the difference between us and your other financial institution(s)?	
The service fees. If they see a deposit coming through and a withdrawal, they don't just still charge a NSF fee even though they see the deposit is enough to cover the charge.	

Retention	Answers
In the past 6 months, have we reached out to you to talk about additional services and options that might benefit you?	No
If NO, Would you like someone to do so?	Yes
Are there any products or services that you wish we would offer?	Yes
If YES, What would you like us to offer?	
More locations/ATMs. Since don't have convenient locations, remove paperwork to not be charged ATM usage fees. I wouldn't have to go to another ATM if my bank ATM is conveniently located.	

Anticipate	Answers
<i>In the next six months...</i>	
What do you anticipate doing?	
Start a home remodel or improvement project	
Would you like someone to contact you about your upcoming need(s)?	No

What additional feedback would you like to give us?

When someone did call, she had such a dry, rude, and nasty attitude. It's like what was the point? To check it off her to do list to get credit for making the call. It was no care behind it. It was a job that needed to be done.

Coaching Notes		
Comment Date	User	Message

Status/History		
Date	User	Action Taken
1/13/2025, 10:50:38 AM		Alert #211602: Spoke with the customer 01/13/2025. She is unaware of the person she spoke with. She stated this encountered happened last summer in either July or August of 2024. She also mentioned that there were several times she had a debit and credit pending at the same time and still accessed and OD fee and wants to see if any of those could be waived. She mentioned a lot of branches closing and the inconvenience of that.
1/13/2025, 7:33:36 AM	avannis	Alert #211602: Alert loaded: Wants to be contacted

Perfect score: A perfect score is achieved when all scores in the Overall Banking Relationship and Overall Service Delivery sections are 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.