

Reason for Action  
Alert: Threaten to  
withdraw funds



NO ACTION NEEDED



Metairie Rd  
TELLER Experience

## Teller customer experience survey

Employee: [REDACTED]	Contact requested? No
Transaction date: 05/21/2025	Preferred contact: [REDACTED]
Survey date: 05/23/2025	Customer on record:
Survey method: Online	Email on record: [REDACTED]
Perfect score? No	Phone on record: 5042361007
WOW? No	Survey taker: [REDACTED]
Index score: 37.5%	

Overall Banking Relationship	Answers
How likely are you to recommend us to others? (1-"Not At All Likely" to 7-"Extremely likely")	1-Not At All Likely
Rate us on being convenient and easy to bank with. (1-"Poor" to 7-"Excellent")	2
Overall Service Delivery	Answers
How satisfied are you with the service you received? (1-"Not At All Satisfied" to 7-"Extremely Satisfied")	2
Was the wait time acceptable to you?	Yes
Team Member Service Delivery	Answers
<i>Did the person who helped you...</i>	
Greet you pleasantly?	Yes
Use your name?	Yes
Discuss other services or solutions that may benefit you?	No
<i>Please rate the person who helped you on the following...(1" Poor" to 7-"Excellent")</i>	
Being genuinely interested in helping you	3
Being knowledgeable	4
Making you feel they value your business	2
Mode of Transaction	Answers
How was your transaction conducted?	With a teller, inside the branch

What Prompted Your Visit?	Answers
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What prompted your visit to the branch?

Conduct a transaction on my account

Anticipate	Answers
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*In the next six months...*

What do you anticipate doing?

Purchase a car or other vehicle; Expand my business footprint.

Would you like someone to contact you about your upcoming need(s)? Maybe Later

What additional feedback would you like to give us?
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Your Veterans Blvd branch in Metairie being shut down is a major inconvenience to me and our company banking needs. It ridiculous it has taken your company so long to remedy the fire damage and reopen. I must strongly reconsider all my accounts with Bank Plus. I'm extremely disappointed with executive leadership. Thank you.

Coaching Notes		
Comment Date	User	Message

Status/History		
Date	User	Action Taken
5/27/2025, 10:49:32 AM		Alert #223783: No action needed
5/27/2025, 10:34:20 AM	avannis	Alert #223783: 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.