

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?

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.

Reason for Action
Alert: Low Satisfaction



NO ACTION NEEDED



Dogwood
CLOSED ACCOUNT
Experience

Closed Account customer experience survey

Empl [REDACTED]	Contact requested? No
Date account was closed: 06/20/2025	Preferred contact: Not Applicable
Survey date: 06/27/2025	Customer on record: [REDACTED]
Survey method: Phone	Email on record: [REDACTED]
Perfect score? No	Phone on record: [REDACTED]
WOW? No	Survey taker: [REDACTED]

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")	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")	1-Not At All Satisfied
Overall Banking Relationship	Answers
<i>Please rate us on...(1-"Poor" to 7-"Excellent")</i>	
Treating you like a person, not a number	2
Keeping your money safe and secure	7-Excellent
Providing competitive interest rates and fees	4
Being flexible and working with your situation	2
Offering a competitive online banking tool	1-Poor
Proactively telling you about services that may benefit you	4
Movement of Funds	Answers
Did you move your funds to another financial institution?	Yes
If YES, which institution did you move them to?	
No Response	

What advantages do you feel your new bank has over us?

My new financial institution is more convenient for me.

Do you still have accounts with us?

No

Retention Efforts

Answers

When you closed the account did the representative discuss other accounts or services that could meet your needs?

No

Do you have any upcoming needs or outstanding items you would like us to contact you about?

No

Reason for Closing

Answers

What prompted you to close your account?

Consolidated with accounts at another bank

Conversation Summary

I closed this account because the branches that were convenient for me were closed. I did have some problems with my online account. I called and they said that they couldn't help me. I went into the bank for assistance, and they said it was fixed. The next day I wasn't able to access my account. I paid my bills online and wasn't able to do that anymore.

Coaching Notes		
Comment Date	User	Message

Status/History		
Date	User	Action Taken
6/30/2025, 8:42:53 AM		Alert #226834: No action needed
6/30/2025, 8:00:04 AM	avannis	Alert #226834: Alert loaded: Low Satisfaction

Perfect score: A perfect score is achieved when all scores in the Overall Banking Relationship and Overall Service Delivery sections have a rating of 6 or 7 and the representative did discuss other accounts or services.

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.