

Reason for Action
Alert: Wants to be
contacted



NEW



Columbia Sumrall Rd
CLOSED ACCOUNT
Experience

Closed Account customer experience survey

Employee: [REDACTED]	Contact requested? Yes
Date account was closed: 03/03/2025	Preferred contact: Not Applicable
Survey date: 03/10/2025	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")	3
Rate us on being convenient and easy to bank with. (1-"Poor" to 7-"Excellent")	6
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")	5
Overall Banking Relationship	Answers
<i>Please rate us on...(1-"Poor" to 7-"Excellent")</i>	
Treating you like a person, not a number	Don't Know (n)
Keeping your money safe and secure	6
Providing competitive interest rates and fees	5
Being flexible and working with your situation	7-Excellent
Offering a competitive online banking tool	Don't Know (n)
Proactively telling you about services that may benefit you	Don't Know (n)
Movement of Funds	Answers
Did you move your funds to another financial institution?	No
If YES, which institution did you move them to?	
No Response	

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

No Response

Do you still have accounts with us?

Yes

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?

Didn't need the account anymore

Conversation Summary

I still have several other accounts at BankPlus after closing one account I no longer needed. They provide good customer service and answer all my questions. The problem I have is that they don't have many branches. It would be nice if there were branches in Hattiesburg and Wiggins. I have had trouble downloading the online service, too, which is aggravating. I haven't gotten any flyers or postcards about additional services that may benefit me.

Coaching Notes		
Comment Date	User	Message

Status/History		
Date	User	Action Taken
3/26/2025, 7:53:30 AM		Alert #217123: Ginger has contacted Mr. Roberts to discuss his banking needs and solve his issues with online banking.
3/11/2025, 7:56:35 AM	avannis	Alert #217123: 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 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.