

482

NO ACTION NEEDED



Jerry Clower  
TELLER Experience

### Teller customer experience survey

Employee: LeAndra Davis	Contact requested? No
Transaction date: 11/27/2023	Preferred contact: Not Applicable
Survey date: 12/01/2023	Customer on record: [REDACTED]
Survey method: Online	Email on record: [REDACTED]
Perfect score? No	Phone on record: [REDACTED]
WOW? No	Survey taker: [REDACTED]
Index score: 75%	

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")	1-Poor
Overall Service Delivery	Answers
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
Team Member Service Delivery	Answers
<b>Did the person who helped you...</b>	
Greet you pleasantly?	Yes
Use your name?	Don't Remember
Discuss other services or solutions that may benefit you?	No
<b>Please rate the person who helped you on the following...(1" Poor" to 7- "Excellent")</b>	
Being genuinely interested in helping you	7-Excellent
Being knowledgeable	6
Making you feel they value your business	7-Excellent
Mode of Transaction	Answers
How was your transaction conducted?	With a teller, inside the branch
What Prompted Your Visit?	Answers
What prompted your visit to the branch?	Because we don't have a branch in Holly Bluff and that's really inconvenient
Anticipate	Answers
<b>In the next six months...</b>	
What do you anticipate doing?	
I don't have any upcoming needs	
What additional feedback would you like to give us?	

It is hard for a senior citizen in poor health to drive all the way to YAZOO just to transact banking business. I don't care how efficient the staff is it still inconvenient to get to YAZOO .

**Coaching Notes**

<b>Comment Date</b>	<b>User</b>	<b>Message</b>

**Status/History**

<b>Date</b>	<b>User</b>	<b>Action Taken</b>
12/20/2023, 10:56:19 AM	lauriechampion@bankplus.net	No action needed

**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.



486



## Consumer Pulse customer service survey

Survey date: 12/09/2023	Contact requested? No
Survey method: Online	Preferred contact: Not Applicable
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")	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")	2
Overall Banking Relationship	Answers
<b>Please rate us on the following...(1-"Poor" to 7-"Excellent")</b>	
Treating you like a person, not a number	5
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	1-Poor
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)?	
Bank plus closed the location on Cleary without any prior notice and there is no other close bank. My other bank is open on Saturday.	
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?	No
Are there any products or services that you wish we would offer?	No
If YES, What would you like us to offer?	
No Response	
Anticipate	Answers
<b>In the next six months...</b>	
What do you anticipate doing?	
I don't have any upcoming needs	
What additional feedback would you like to give us?	
I am going to close my account because location is inconvenient.	

**Coaching Notes**

Comment Date	User	Message

**Status/History**

Date	User	Action Taken
12/11/2023, 10:13:53 AM	lindaperry@bankplus.net	Alert #174790: Spoke with Cheryl. Addressed Vets branch closure. Advised of other banking options including digital.
12/11/2023, 9:59:30 AM	lindaperry@bankplus.net	Alert #174790: Left VM for customer to return my call. 12.11.23 9:58AM
12/11/2023, 8:39:48 AM	avannis	Alert #174790: Alert loaded: Low Satisfaction

**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.



Reason for Action  
Alert: Low Satisfaction



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NO ACTION NEEDED

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Dogwood  
TELLER Experience

## Teller customer experience survey

Employee: Lonnie Harris	Contact requested? No
Transaction date: 12/14/2023	Preferred contact: Not Applicable
Survey date: 12/18/2023	Customer on record: [REDACTED]
Survey method: Online	Email on record [REDACTED]
Perfect score? No	Phone on record [REDACTED]
WOW? No	Survey taken [REDACTED]
Index score: 62.5%	

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")	2
Overall Service Delivery	Answers
How satisfied are you with the service you received? (1-"Not At All Satisfied" to 7-"Extremely Satisfied")	1-Not At All Satisfied
Was the wait time acceptable to you?	Yes
Team Member Service Delivery	Answers
<b>Did the person who helped you...</b>	
Greet you pleasantly?	Yes
Use your name?	Don't Remember
Discuss other services or solutions that may benefit you?	No
<b>Please rate the person who helped you on the following...(1" Poor" to 7- "Excellent")</b>	
Being genuinely interested in helping you	6
Being knowledgeable	6
Making you feel they value your business	6
Mode of Transaction	Answers
How was your transaction conducted?	At the drive-thru window
What Prompted Your Visit?	Answers
What prompted your visit to the branch?	
Conduct a transaction on my account	
Anticipate	Answers
<b>In the next six months...</b>	
What do you anticipate doing?	
Invest for retirement/college savings/another purpose	
Would you like someone to contact you about your upcoming need(s)?	No
What additional feedback would you like to give us?	
The atm outside stopped working and my card was stuck for about 30 minutes. Also bankplus in the jackson area have been closing which is very unfortunate	

**Coaching Notes**

Comment Date	User	Message

**Status/History**

Date	User	Action Taken
12/19/2023, 8:57:14 AM	markgraves@bankplus.net	Alert #175671: No action needed
12/19/2023, 8:40:03 AM	avannis	Alert #175671: Alert loaded: Low Satisfaction

**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 11 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.

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Baton Rouge Jefferson Hwy  
TELLER Experience

### Teller customer experience survey

Employee: Denielle Shaw	Contact requested? No
Transaction date: 02/20/2024	Preferred contact: Not Applicable
Survey date: 02/21/2024	Customer on record:
Survey method: Online	Email on record: [REDACTED]
Perfect score? No	Phone on record: [REDACTED]
WOW? No	Survey taker: [REDACTED]
Index score: 0%	

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

Overall Service Delivery	Answers
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How satisfied are you with the service you received? (1-"Not At All Satisfied" to 7-"Extremely Satisfied")	5
Was the wait time acceptable to you?	No

Team Member Service Delivery	Answers
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**Did the person who helped you...**

Greet you pleasantly?	No
Use your name?	No
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	4
Being knowledgeable	4
Making you feel they value your business	4

Retention	Answers
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No Response	
Bank Plus has closed two locations in Baton Rouge, it is not convenient to us Bank Plus.	

Mode of Transaction	Answers
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How was your transaction conducted?	At the drive-thru window
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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?	
Switching to a bank with more locations	
Would you like someone to contact you about your upcoming need(s)?	No

What additional feedback would you like to give us?
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Bank Plus has closed two locations in Baton Rouge, it is not convenient to us Bank Plus.
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Coaching Notes		
Comment Date	User	Message

Status/History		
Date	User	Action Taken

**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 11 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.





Metairie Rd  
TELLER Experience

### Teller customer experience survey

Employee: Keele Pomet	Contact requested? No
Transaction date: 02/22/2024	Preferred contact: Not Applicable
Survey date: 02/24/2024	Customer on record: [REDACTED]
Survey method: Online	Email on record: [REDACTED]
Perfect score? No	Phone on record: [REDACTED]
WOW? No	Survey taker: [REDACTED]
Index score: 100%	

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")	4
Overall Service Delivery	Answers
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
Team Member Service Delivery	Answers
<b>Did the person who helped you...</b>	
Greet you pleasantly?	Yes
Use your name?	Yes
Discuss other services or solutions that may benefit you?	Yes
<b>Please rate the person who helped you on the following...(1" Poor" to 7-"Excellent")</b>	
Being genuinely interested in helping you	7-Excellent
Being knowledgeable	7-Excellent
Making you feel they value your business	7-Excellent
Retention	Answers
No Response	
Disappointed in the time taking to rebuild the branch that caught fire, thought there'd be a temporary building	
Mode of Transaction	Answers
How was your transaction conducted?	With a teller, inside the branch
What Prompted Your Visit?	Answers
What prompted your visit to the branch?	
Conduct a transaction on my account	
Anticipate	Answers
<b>In the next six months...</b>	
What do you anticipate doing?	
I don't have any upcoming needs	
What additional feedback would you like to give us?	Answers
Disappointed in the time taking to rebuild the branch that caught fire, thought there'd be a temporary building	

**Coaching Notes**

Comment Date	User	Message
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**Status/History**

Date	User	Action Taken
2/26/2024, 11:48:25 AM	kelliesvihla@bankplus.net	No action needed

**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 11 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.

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Reason for Action  
Alert: Low Satisfaction



NO ACTION NEEDED



Covington Northpark  
CLOSED ACCOUNT Experience

### Closed Account customer experience survey

Employee: Tracy Combs	Contact requested? No
Date account was closed: 03/15/2024	Preferred contact: Not Applicable
Survey date: 03/21/2024	Customer on record: Confidentiality requested
Survey method: Online	Email on record: Confidentiality requested
Perfect score? No	Phone on record: Confidentiality requested
WOW? No	Survey taker: Confidentiality Requested

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")	5
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")	3
Overall Banking Relationship	Answers
<i>Please rate us on...(1-"Poor" to 7-"Excellent")</i>	
Treating you like a person, not a number	7-Excellent
Keeping your money safe and secure	7-Excellent
Providing competitive interest rates and fees	5
Being flexible and working with your situation	4
Offering a competitive online banking tool	5
Proactively telling you about services that may benefit you	7-Excellent
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?	
No Response	
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?	
Wanted a local/community bank; To much traffic and the branch near us closed	
What additional feedback would you like to give us?	

**Coaching Notes**

Comment Date	User	Message
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**Status/History**

Date	User	Action Taken
3/25/2024, 8:48:56 AM	lisazenor@bankplus.net	Alert #183694: customer was not happy the branch in Terra Bella closed. Our location is not convenient for them.
3/22/2024, 9:28:23 AM	avannis	Alert #183694: 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.

Reason for Action  
Alert: Low Satisfaction



RESOLVED

564



Spillway  
ITM Experience

## ITM customer experience survey

Employee: Chebes Rush	Contact requested? No
Transaction date: 04/22/2024	Preferred contact: Not Applicable
Survey date: 04/24/2024	Customer on record: [REDACTED]
Survey method: Online	Email on record: [REDACTED]
Perfect score? No	Phone on [REDACTED]
WOW? No	Survey taker: [REDACTED]
Location: Spillway	

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
How satisfied are you with the service you received? (1-"Not At All Satisfied" to 7-"Extremely Satisfied")	1-Not At All Satisfied
Was the wait time for someone to respond acceptable to you?	Yes
Was the volume of the speaker too loud, too soft, or just right?	Just Right
How would you rate the clarity of the video image? (1-"Poor" to 7-"Excellent")	3
Team Member Service Delivery	Answers
<i>Did the person who helped you...</i>	
Resolve your question or request to your satisfaction?	Yes
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>	
Treating you like a person, not a number	5
Giving you their undivided attention	5
Being knowledgeable	5
Making you feel they value your business	5
What Prompted Your Visit?	Answers
What prompted your visit?	
Conduct a transaction on my account	
Anticipate	Answers
<i>In the next six months...</i>	
What do you anticipate doing?	
Pull my money out of bank plus	
Would you like someone to contact you about your upcoming need(s)?	No
What additional feedback would you like to give us?	
No one likes ITM machines. Taking the tellers out of the bank is ruining the relationships. Shutting the blinds on the customers and their largest assets from being able to do business with a human being face to face.	



**Coaching Notes**

Comment Date	User	Message
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**Status/History**

Date	User	Action Taken
5/1/2024, 11:29:42 AM	paigewhite@bankplus.net	Alert #186696: from Wilda: Debbie was familiar with this customer so she made contact with him his morning. He just told her that even though he was young he preferred doing business with on site branch personnel rather than the ITM. He thinks that banking should continue to be a personal transaction business . He also stated that he had applied for a startup business loan about 12 months or so and he was declined. He was able to go to another local bank and get the loan. He stated that the business is doing well thanks to the other bank being willing to help him get started. This was also part of his low satisfaction rating of the bank. Hope this information helps.
4/25/2024, 2:56:18 PM	paigewhite@bankplus.net	Alert #186696: sent to wilda taylor
4/25/2024, 12:12:55 PM	avannis	Alert #186696: Alert loaded: Low Satisfaction

**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 and the volume of the speaker was just right.

**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



RESOLVED

567



Clinton Boulevard  
CONSUMER PULSE Experience

## Consumer Pulse customer service survey

Survey date: 04/23/2024

Survey method: Online

Perfect Score: No

WOW? No

Survey taker: [REDACTED]

Contact requested? No

Preferred contact: Not Applicable

Customer on record: [REDACTED]

Email on record: [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")	3
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")	3
Overall Banking Relationship	Answers
<b>Please rate us on the following...(1-"Poor" to 7-"Excellent")</b>	
Treating you like a person, not a number	4
Keeping your money safe and secure	5
Providing competitive interest rates and fees	4
Being flexible and working with your situation	4
Offering a competitive online banking tool	5
Proactively telling you about services that may benefit you	3
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)?	Previously convenience and friendly service- Due to the closure of my preferred branch and most of the staff being let go or relocating I'm not as pleased
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?	No
Are there any products or services that you wish we would offer?	Yes
If YES, What would you like us to offer?	Reopen Cynthia St branch in Clinton
Anticipate	Answers
<b>In the next six months...</b>	
What do you anticipate doing?	I don't have any upcoming needs
What additional feedback would you like to give us?	

**Coaching Notes**

Comment Date	User	Message
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**Status/History**

Date	User	Action Taken
4/26/2024, 3:04:55 PM	leighmann@bankplus.net	Alert #186578: Unable to reach Mr. Miley by phone. Sending him a Thank You card for taking our survey and expressing that we will always be here for him now and in the future. Requesting for him to visit us at both locations.
4/24/2024, 10:13:06 AM	avannis	Alert #186578: Alert loaded: Low Satisfaction

**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.



Clinton Boulevard  
CONSUMER PULSE Experience

### Consumer Pulse customer service survey

Survey date: 05/03/2024	Requested? No
Survey method: Online	Preferred contact: Not Applicable
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")	3
Rate us on being convenient and easy to bank with. (1-"Poor" to 7-"Excellent")	2
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
<b>Please rate us on the following...(1-"Poor" to 7-"Excellent")</b>	
Treating you like a person, not a number	6
Keeping your money safe and secure	6
Providing competitive interest rates and fees	5
Being flexible and working with your situation	5
Offering a competitive online banking tool	6
Proactively telling you about services that may benefit you	3
Competition	Answers
Do you bank with another financial institution besides us?	No
If YES, What is the difference between us and your other financial institution(s)?	
No Response	
Retention	Answers
In the past 6 months, have we reached out to you to talk about additional services and options that might benefit you?	Not Necessary
Are there any products or services that you wish we would offer?	Yes
If YES, What would you like us to offer?	
More mini banks. Since you closed some of your branches. I have to sit in long lines to get money	
Anticipate	Answers
<b>In the next six months...</b>	
What do you anticipate doing?	
I don't have any upcoming needs	
What additional feedback would you like to give us?	

**Coaching Notes**

Comment Date	User	Message
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**Status/History**

Date	User	Action Taken
5/6/2024, 2:44:04 PM	leighmann@bankplus.net	Looks to be a Brandon Customer that only visits the branch there for ATM Withdrawals.

**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.





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Greenfield Road  
TELLER Experience

## Teller customer experience survey

Employee: Kathy Davis	Contact requested? No
Transaction date: 05/16/2024	Preferred contact: Not Applicable
Survey date: 05/21/2024	Customer on record: [REDACTED]
Survey method: Online	Email on record: [REDACTED]
Perfect score? No	Phone on record: [REDACTED]
WOW? No	Survey taker: [REDACTED]
Index score: 75%	

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")	2
Overall Service Delivery	Answers
How satisfied are you with the service you received? (1-"Not At All Satisfied" to 7-"Extremely Satisfied")	1-Not At All Satisfied
Was the wait time acceptable to you?	No
Team Member Service Delivery	Answers
<b>Did the person who helped you...</b>	
Greet you pleasantly?	Yes
Use your name?	Yes
Discuss other services or solutions that may benefit you?	Yes
<b>Please rate the person who helped you on the following...(1" Poor" to 7-"Excellent")</b>	
Being genuinely interested in helping you	7-Excellent
Being knowledgeable	7-Excellent
Making you feel they value your business	7-Excellent
Mode of Transaction	Answers
How was your transaction conducted?	With a teller, inside the branch
What Prompted Your Visit?	Answers
What prompted your visit to the branch?	ATM withdrawal. ATM did not work.
Anticipate	Answers
<b>In the next six months...</b>	
What do you anticipate doing?	I don't have any upcoming needs
What additional feedback would you like to give us?	

With one branch closing in Brandon MS 39042, there is only one branch and one ATM. The ATM does not work on a routine basis. It is VERY frustrating to have to go inside (when open) or drive all the way to Pearl, MS to simply withdraw cash. I have been with BankPlus since 1998 and reduced open hours and continuous ATM issues is not very customer friendly for a simple transaction.

**Coaching Notes**

Comment Date	User	Message

**Status/History**

Date	User	Action Taken
5/30/2024, 8:56:06 AM	JeanCooper@BankPlus.net	Alert # 189292: emailed the customer.
5/22/2024, 8:56:00 AM	avannis	Alert # 189292: Alert loaded: Low Satisfaction

**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.



NO ACTION NEEDED

597



Olive Branch  
TELLER Experience

## Teller customer experience survey

Employee: Haina Grant-Haynes	Contact requested? No
Transaction date: 05/31/2024	Preferred contact: [REDACTED]
Survey date: 06/05/2024	Customer on record: [REDACTED]
Survey method: Online	Email on record: [REDACTED]
Perfect score? No	Phone on record: [REDACTED]
WOW? No	Survey taker: [REDACTED]
Index score: 87.5%	

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")	1-Poor
Overall Service Delivery	Answers
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
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?	Don't Remember
<i>Please rate the person who helped you on the following...(1" Poor" to 7-"Excellent")</i>	
Being genuinely interested in helping you	7-Excellent
Being knowledgeable	7-Excellent
Making you feel they value your business	7-Excellent
Mode of Transaction	Answers
How was your transaction conducted?	At the drive-thru window
What Prompted Your Visit?	Answers
What prompted your visit to the branch?	
Conduct a transaction on my account	
Anticipate	Answers
<i>In the next six months...</i>	
What do you anticipate doing?	
Purchase a car or other vehicle	
Would you like someone to contact you about your upcoming need(s)?	No
What additional feedback would you like to give us?	
I have been a BankPlus member for a lengthy time now. I did so because the bank was located in a low traffic area but strongly because of its longer operating hours. I don't like the banking hours now the bank closes much too early. If the operating hours were M-Thurs closing at 4:30 and Fridays closing at 6 pm it would be much appreciated. It is so hard to bank with BankPlus now I am a full-time working person the current bank hours are terrible.	

Coaching Notes		
Comment Date	User	Message

Status/History		
Date	User	Action Taken
6/6/2024, 11:38:33 AM	LaylaArmistead	No action needed

**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



RESOLVED

600



Strawberry Hill  
TELLER Experience

## Teller customer experience survey

Employee: Brianna Nash	Contact requested? No
Transaction date: 06/10/2024	Preferred contact: Not Applicable
Survey date: 06/12/2024	Customer on record: [REDACTED]
Survey method: Online	Email on record: [REDACTED]
Perfect score? No	Phone on record: [REDACTED]
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")	3
Rate us on being convenient and easy to bank with. (1-"Poor" to 7-"Excellent")	3
Overall Service Delivery	Answers
How satisfied are you with the service you received? (1-"Not At All Satisfied" to 7-"Extremely Satisfied")	4
Was the wait time acceptable to you?	Yes
Team Member Service Delivery	Answers
<b>Did the person who helped you...</b>	
Greet you pleasantly?	Yes
Use your name?	Don't Remember
Discuss other services or solutions that may benefit you?	Don't Remember
<b>Please rate the person who helped you on the following...(1" Poor" to 7-"Excellent")</b>	
Being genuinely interested in helping you	5
Being knowledgeable	5
Making you feel they value your business	6
Mode of Transaction	Answers
How was your transaction conducted?	At the drive-thru window
What Prompted Your Visit?	Answers
What prompted your visit to the branch?	
We didn't visit the branch	
Anticipate	Answers
<b>In the next six months...</b>	
What do you anticipate doing?	
Invest for retirement/college savings/another purpose	
Would you like someone to contact you about your upcoming need(s)?	No
What additional feedback would you like to give us?	
Don't like remote teller. Don't like that you can't call your neighbor bank on the phone. Next think will be someone in the Philippines like Comcast.	



**Coaching Notes**

Comment Date	User	Message

**Status/History**

Date	User	Action Taken
6/20/2024, 8:58:06 AM	devontesenter@bankplus.net	Alert #191237: I called the customer and thanked him for the survey. I spoke with him about being a direct contact for his banking needs.
6/13/2024, 9:39:02 AM	avannis	Alert #191237: Alert loaded: Low Satisfaction

**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.



<p>EMOTIONAL STATUS</p> <p><input type="radio"/></p> <p>Furious</p>	<p>DATE RESPONDED TO</p> <p>Aug 01, 2024</p>	<p>COMPLAINT ID</p> <p>00612</p>
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VivianMcBride@BankPlus.net  
Alert #192995: Ellis Harris spoke with [REDACTED] and he is OK with charges. However, Ellis wants to be clear on the fact that the \$1200 is for 2 loans that are secured by Time Deposits, and \$850 of the \$1200 are Doc Prep fees (which are out of our control). All Steven Flemming charged [REDACTED] was an Origination Fee on each loan of \$175.00. \*\* For the record, Mr. Harris disagrees with the large Doc Prep Fees on loans secured by Time Deposits.

Diana Lind added a response

4 hours ago

DETAILS    RESPONSE

CONTACT

Title

First Name

Last Name

Business Name

Email

Phone



## Best Time to Contact

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## DETAILS

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Complaint Owner

Vivian McBride

Notes

Complaint Details

I was already a customer with Bank Plus. I was not satisfied with the service with this transaction. I was charged a \$1,200 processing fee. **One of the branches just closed and it was replaced by a live ATM. I do most of my banking in Lexington. I like that the bank is local and a community bank. I don't like banking with the big banks.**

Categories

Fees

Sources

Avannis

Does this complaint need attention by the Escalation Team

No-case was handled by submitter

Subcategories

Loan Fee

Associated Regulations

CRA (Reg BB)

Banking Center

Holmes County Banking Center

Branches

Lexington

Departments

Compliance Tag

Date/Time Received

Jul 01, 2024 @ 12:00 am

Attachments

Emotional Status

Furious

CIF Number

OAA0229

Social Media User Name

Social Media Complaint Tag

Escalation Team Selection

Source

Avannis

## INFORMATION

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Last Updated By

Diana Lind

Date/Time Last Updated

Aug 02, 2024 @ 12:16 pm

Form Submitted

Complaint ID

612

Responded By

Diana Lind

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