

Reason for Action  
Alert: Low Satisfaction



NEW



## Baton Rouge Jefferson Hwy CLOSED ACCOUNT Experience

### Closed Account customer experience survey

Employee: [REDACTED]	Contact requested? No
Date account was closed: 12/16/2024	Preferred contact: Not Applicable
Survey date: 12/21/2024	Customer on record: CARLA JUMONVILLE
Survey method: Online	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")	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")	3

Overall Banking Relationship	Answers
<i>Please rate us on...(1-"Poor" to 7-"Excellent")</i>	
Treating you like a person, not a number	6
Keeping your money safe and secure	6
Providing competitive interest rates and fees	4
Being flexible and working with your situation	6
Offering a competitive online banking tool	4
Proactively telling you about services that may benefit you	2

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?	Location.

Do you still have accounts with us? No

<b>Retention Efforts</b>	<b>Answers</b>
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When you closed the account did the representative discuss other accounts or services that could meet your needs?	No
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Do you have any upcoming needs or outstanding items you would like us to contact you about?	No
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<b>Reason for Closing</b>	<b>Answers</b>
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What prompted you to close your account?
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Consolidated with accounts at another bank; Needed a bank with more branches

<b>What additional feedback would you like to give us?</b>
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Not enough locations. Bank near me closed.
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### Coaching Notes

Comment Date

User

Message

### Status/History

Date

User

Action Taken

12/23/2024, 8:46:00 AM

avannis

Alert #210173: 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  
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RESOLVED



Canton  
CONSUMER PULSE Experience

## Consumer Pulse customer service survey

Survey date: 11/14/2024	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")	2
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
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### Overall Banking Relationship Answers

**Please rate us on the following...(1-"Poor" to 7-"Excellent")**

Treating you like a person, not a number	7-Excellent
Keeping your money safe and secure	7-Excellent
Providing competitive interest rates and fees	Don't Know (n)
Being flexible and working with your situation	1-Poor
Offering a competitive online banking tool	5
Proactively telling you about services that may benefit you	5

### 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?	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?	Put back local offices. Just about all locations have been closed.

### Anticipate Answers

**In the next six months...**

What do you anticipate doing?	
Open a checking account/debit card for my child,teen or young adult	
Would you like someone to contact you about your upcoming need(s)?	No

### What additional feedback would you like to give us?

Need to open back up more locations.

### Coaching Notes

Comment Date

User

Message

### Status/History

Date

User

Action Taken

11/19/2024, 2:26:19 PM

[REDACTED]

Alert #206868: unable to contact customer

11/15/2024, 3:33:51 PM

[REDACTED]

Alert #206868: Called and left a message to call me back.

11/15/2024, 9:08:59 AM

avannis

Alert #206868: Alert loaded: Low Satisfaction

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**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.