



Greenwood Hwy 82
TELLER Experience

Teller customer experience survey

| | |
|------------------------------|-----------------------------------|
| Employee: [REDACTED] | Contact requested? No |
| Transaction date: 10/22/2024 | Preferred contact: Not Applicable |
| Survey date: 10/28/2024 | 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: 12.5% | |

| 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") | 1-Not At All Satisfied |
| Was the wait time acceptable to you? | Yes |
| Team Member Service Delivery | Answers |
| 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 | 3 |
| Being knowledgeable | 3 |
| Making you feel they value your business | 1-Poor |
| 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 |
| In the next six months... | |
| What do you anticipate doing? | |
| I don't have any upcoming needs | |
| What additional feedback would you like to give us? | |
| I live in Isola and I work in Indianola. I have to drive to Belzoni or Greenwood in order to conduct any business at BankPlus due to our branch being closed and the teller machine broken in Isola. It is such an inconvenient to conduct business at BankPlus and no one seems to care. Highly disappointed as most of us are in Isola. We really need a working teller machine back in Isola. | |

Coaching Notes

| Comment Date | User | Message |
|--------------|------|---------|
| | | |

Status/History

| Date | User | Action Taken |
|-------------------------|------------|---|
| 10/30/2024, 11:00:09 AM | [REDACTED] | Alert #205301: Customer is frustrated with the Isola situation. |
| 10/30/2024, 10:32:10 AM | avannis | Alert #205301: 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.