



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
<b>Did the person who helped you...</b>	
Greet you pleasantly?	No
Use your name?	No
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	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
<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 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.

Reason for Action  
Alert: Low Satisfaction



RESOLVED



Clinton Boulevard  
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")

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

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")

4

### Overall Banking Relationship

#### Answers

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

Treating you like a person, not a number

6

Keeping your money safe and secure

6

Providing competitive interest rates and fees

Don't Know (n)

Being flexible and working with your situation

3

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?

Open the branches back up or at least put in more mini tellers. I get tired of having to wait in line to get to a minibank.

### 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?



## Coaching Notes

Comment Date

User

Message

## Status/History

Date

User

Action Taken

11/25/2024,  
4:08:11 PM

[REDACTED]

Alert #206879: We are not familiar with [REDACTED]. Also being on the branch level, we do not have control of how many mini tellers/machines. I am going to mail him a thank you card for taking our survey.

11/15/2024,  
9:55:02 AM

[REDACTED]

Alert #206879: Checking with Jean @ Greenfield Road to see if she is familiar with this customer.

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

avannis

Alert #206879: 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.