

Reason for Action  
Alert: Low Satisfaction



NO ACTION NEEDED



Belzoni  
COMMERCIAL PULSE Experience

## Commercial Pulse customer service survey

Survey date: 09/03/2024	Contact requested? No
Survey method: Online	Preferred contact: Not Applicable
Perfect Score: No	Customer on record: Confidentiality requested
WOW? No	Email on record: Confidentiality requested
Survey taker: Confidentiality Requested	Phone on record: Confidentiality requested

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
How likely are you to consider us for future accounts or services if the need arises? (1-"Not At All Likely" to 7-"Extremely Likely")	1-Not At All Likely
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
Do you have an assigned banker or a "go to" person who knows you and your situation?	No
Overall Banking Relationship	Answers
<b>Please rate us on the following...(1-"Poor" to 7-"Excellent")</b>	
Providing competitive interest rates and fees	2
Being flexible and working with your situation	1-Poor
Proactively telling you about services that may benefit you	1-Poor
Understanding your company's objectives and strategy	1-Poor
Offering effective cash flow services for your business (e.g. remote deposit capture, positive pay, merchant services, etc.)	Don't Know (n)
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?	No
If YES, what you would like us to offer?	No Response
Reason for Business Relationship	Answers
How did you originally choose to bank/finance with us?	it use to be citizen bank and I was already their when they changed names.
Anticipate	Answers
<b>In the next six months...</b>	
What do you anticipate doing?	we need bank back in our town
Would you like someone to contact you about your upcoming need(s)?	No
What additional feedback would you like to give us?	
they close the bank down in Isola and we have always had bank and now nothing	

### Coaching Notes

Comment Date

User

Message

### Status/History

Date

User

Action Taken

9/4/2024,  
12:51:38 PM

[REDACTED]

Alert #199725: Can't reach out because confidentiality, but will forward over to City President. Will report on President's call for Sept.

9/4/2024,  
11:11:06 AM

avannis

Alert #199725: Alert loaded: Low Satisfaction

**Perfect score:** A perfect score is achieved when all questions in the Overall Banking Relationship and Overall Service Delivery sections are a rating of 6 or 7 and the respondent does have an assigned banker or "go to" person.

**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



Greenfield Road  
COMMERCIAL PULSE Experience

## Commercial Pulse customer service survey

Survey date: 09/24/2024	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")	Don't Know (n)
How likely are you to consider us for future accounts or services if the need arises? (1-"Not At All Likely" to 7-"Extremely Likely")	1-Not At All Likely

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
Do you have an assigned banker or a "go to" person who knows you and your situation?	No

Overall Banking Relationship	Answers
<b>Please rate us on the following...(1-"Poor" to 7-"Excellent")</b>	
Providing competitive interest rates and fees	Don't Know (n)
Being flexible and working with your situation	1-Poor
Proactively telling you about services that may benefit you	4
Understanding your company's objectives and strategy	1-Poor
Offering effective cash flow services for your business (e.g. remote deposit capture, positive pay, merchant services, etc.)	Don't Know (n)

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 you would like us to offer?	

My account is in my trust and they made me have a business account for my personal checking account. Also they closed my closest branch and I had my sister and son on my safety deposit box so I asked if they could transfer their signature card to the next closest branch because they live in Wi and Mn but I was told no. So I don't have a safety deposit box now.

Reason for Business Relationship	Answers
How did you originally choose to bank/finance with us?	
The bank was close to the motel we were in when moving to the area.	

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?**

They are not helpful to a senior citizen making me have a business account especially with having free checks and now the checks are extremely expensive.

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### Coaching Notes

**Comment Date**

**User**

**Message**

### Status/History

**Date**

**User**

**Action Taken**

9/27/2024, 9:38:49 AM

[REDACTED]

Alert #202033: I emailed the customer.

9/25/2024, 10:48:33 AM

avannis

Alert #202033: Alert loaded: Low Satisfaction

**Perfect score:** A perfect score is achieved when all questions in the Overall Banking Relationship and Overall Service Delivery sections are a rating of 6 or 7 and the respondent does have an assigned banker or "go to" person.

**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: [REDACTED]	Contact requested? No
Transaction date: 09/24/2024	Preferred contact: Not Applicable
Survey date: 09/25/2024	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
<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?	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	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?	
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?
Very disappointed in the branch on Veterans sitting idle. I am not happy to only have one branch to go to...

### Coaching Notes

Comment Date

User

Message

### Status/History

Date

User

Action Taken

9/27/2024, 12:33:35 PM

[REDACTED]

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.