

VBA-MDP 2021

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**30**

Total Responses

30 Completed Responses

0 Partial Responses

**84**

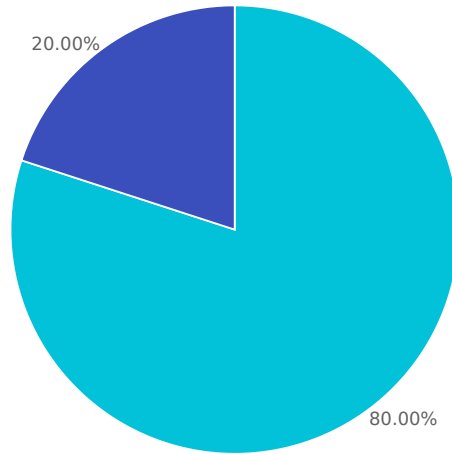
Survey Visits

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Q1

### Did you shop a Bank or Credit Union?

Answered: 30 Skipped: 0



Bank

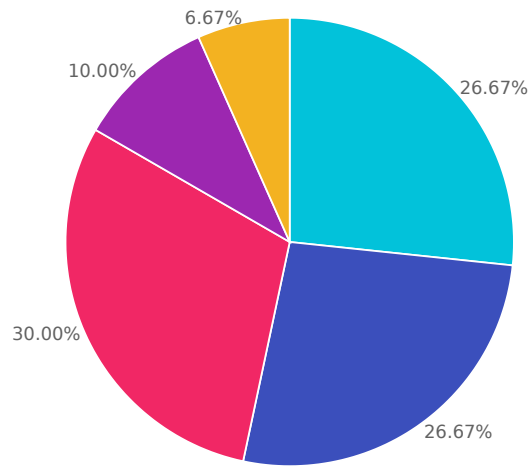
● Credit Union

Choices	Response percent	Response count
Bank	80.00%	24
Credit Union	20.00%	6

Q2

Total Number of Rings:

Answered: 30 Skipped: 0



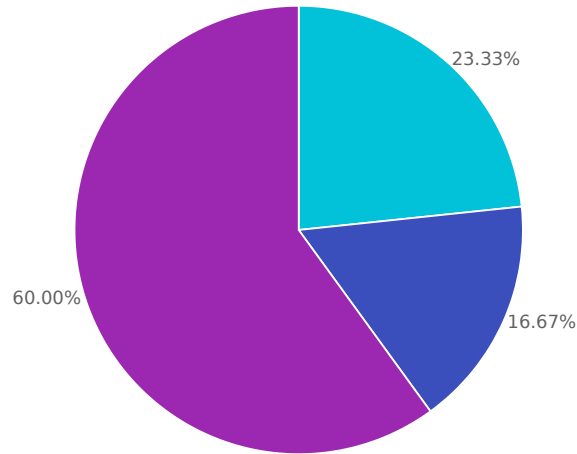
- 1
- 2
- 3
- 4
- 5+

Choices	Response percent	Response count
1	26.67%	8
2	26.67%	8
3	30.00%	9
4	10.00%	3
5+	6.67%	2

Q3

### Total Number of Transfers:

Answered: 30 Skipped: 0

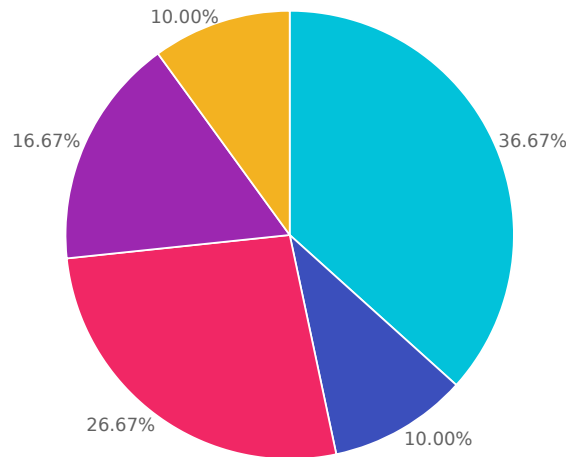


Choices	Response percent	Response count
1	23.33%	7
2	16.67%	5
3+	0.00%	0
No Transfers	60.00%	18

Q4

### "On Hold" Time (If Any)

Answered: 30 Skipped: 0



- None
- Less than 30 seconds
- 1 minute or less
- 1-2 minutes
- 3-4 minutes
- More than 5 minutes

Choices	Response percent	Response count
None	36.67%	11
Less than 30 seconds	10.00%	3
1 minute or less	26.67%	8
1-2 minutes	16.67%	5
3-4 minutes	10.00%	3
More than 5 minutes	0.00%	0
Additional comments?		6

#### Additional comments?

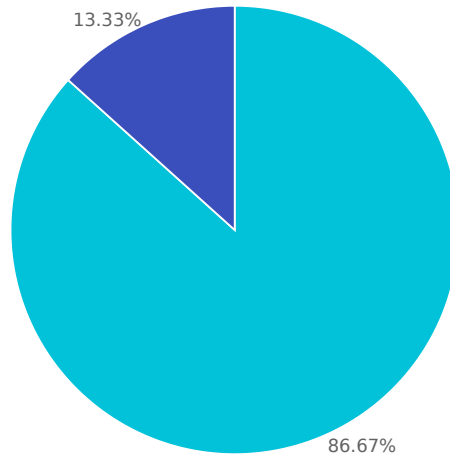
- multiple times on hold
- First 2 times I called, it was answered with the "This call may be recorded" message and then they disconnected the call, so I called a different number with the same bank.
- I did not have a transfer but the young lady asked for my info so someone could call me back as she could not tell me anything but that they did have several checking accounts. They called back the next afternoon

4. I called the local branch. Got a recorded greeting to leave a message for a branch personal to call. I pressed 1 for customer service which took me to a corporate office. I stated I was looking for checking account information and her response was "What do you want to know"? I asked to be connected to the local Chester Branch. She transferred me and within one minute my call was answered.
5. Hold announcement was horrible, breaking up the entire time, could not understand some of the requests
6. The individual that answered the phone assisted me

Q5

Did the employee identify the bank and/or their department?

Answered: 30 Skipped: 0



Yes

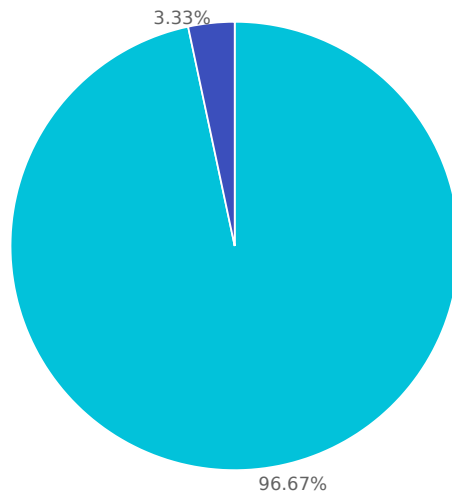
● No

Choices	Response percent	Response count
Yes	86.67%	26
No	13.33%	4

Q6

Did the employee identify him/herself by name?

Answered: 30 Skipped: 0



Yes

No

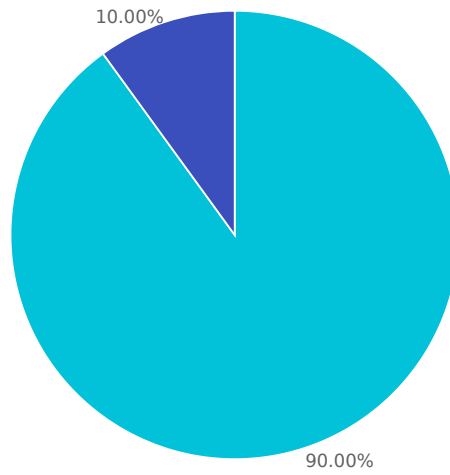
Choices	Response percent	Response count
Yes	96.67%	29
No	3.33%	1



Q7

Did the employee use a pleasant tone of voice throughout the call?

Answered: 30 Skipped: 0



Yes

● No

Choices	Response percent	Response count
Yes	90.00%	27
No	10.00%	3

Q8

What words would you use to describe your first impression?

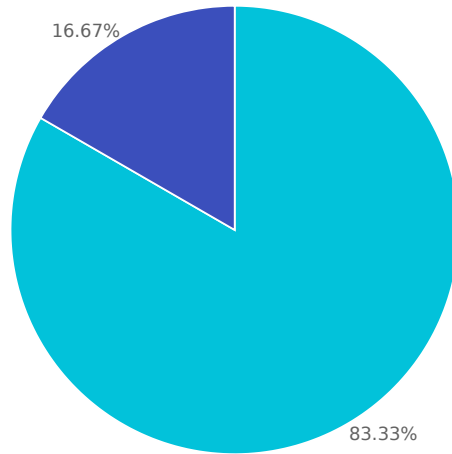
Answered: 30 Skipped: 0

1. Pleasant, Positive.
2. Amazing
3. Very Polite
4. The first employee to answer the phone was hard to understand and didn't give her name. She then transferred me to a branch. She let me know the name of the person she was transferring me to. Both were very polite.
5. Willing to help. They sounded like they wanted my business but also wanted to make sure all my questions answered.
6. Friendly and knowledgeable.
7. Professional, Knowledgeable, Efficient
8. Rude, clueless, annoyed
9. Friendly
10. Friendly, helpful
11. In a hurry; product pusher
12. irritated that they kept disconnecting me; experience improved when I finally reached a person and felt like they wanted to help me
13. The first person I talked to was very pleasant
14. Employee seemed rushed in answering the phone, or as if she was pre-occupied with something else other than the phone.
15. The gentleman was seemed pre occupied and uninterested. There was no personal connection to build rapport. The guy wanted to get straight to my objective of the call.
16. Somewhat pleasant initially, but manufactured.
17. employee- professional pleasant
18. The representative sounded very eager to talk and help/did not sound like they were in a hurry.
19. Nice
20. Pleasant but rushed.
21. Polite
22. Professional,
23. Cheerful and Friendly
24. I felt the employee was happy to help me.
25. She was very kind and asked me my name. She also was up front that she needed a moment to gather the appropriate information.
26. The employee was pleasant however I could tell that they weren't engaged in conversation.
27. She was very pleasant!
28. pleasant
29. Friendly, knowledgeable, eager to help
30. Polite, patient and helpful.

Q9

Did the employee have a good understanding of the products or services?

Answered: 30 Skipped: 0



Yes

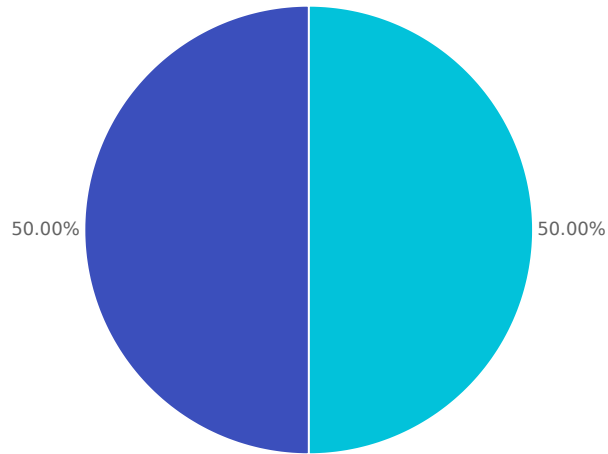
● No

Choices	Response percent	Response count
Yes	83.33%	25
No	16.67%	5

Q10

Did the employee ask questions to determine the best account for you?

Answered: 30 Skipped: 0



Yes

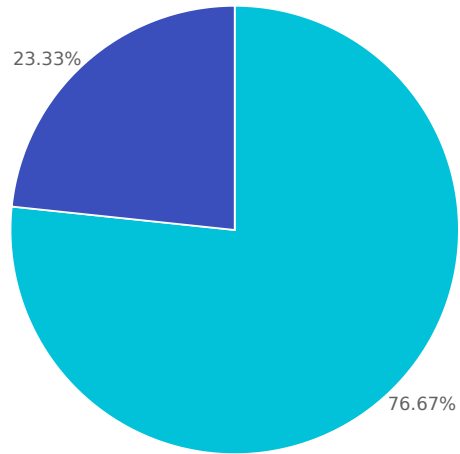
No

Choices	Response percent	Response count
Yes	50.00%	15
No	50.00%	15

Q11

Did the employee answer your questions to your satisfaction?

Answered: 30 Skipped: 0



Yes

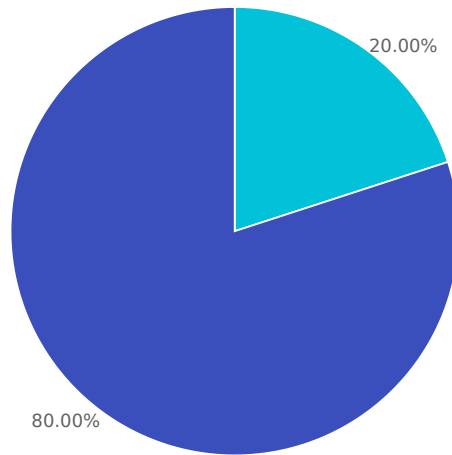
● No

Choices	Response percent	Response count
Yes	76.67%	23
No	23.33%	7

Q12

Did the employee offer any incentives or reasons to open a checking account with their bank?

Answered: 30 Skipped: 0



Yes

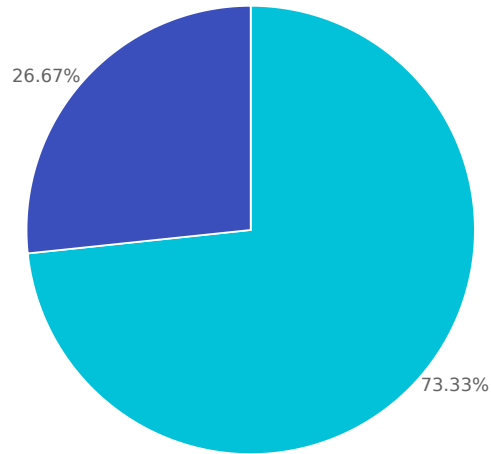
● No

Choices	Response percent	Response count
Yes	20.00%	6
No	80.00%	24

Q13

Did you feel that the employee was listening and responding to your needs?

Answered: 30 Skipped: 0



Yes

● No

Choices	Response percent	Response count
Yes	73.33%	22
No	26.67%	8

Q14

## What was positive about the experience?

Answered: 30 Skipped: 0

1. They used their name to identify themselves, and continued to use my name when addressing me.
2. Josh was so friendly and welcoming he wanted to make sure I understood all of the benefits to bank with Primis.
3. Very polite
4. The CSA was very nice and helpful in explaining the two types of accounts.
5. They were able to list the product features for their account types. They did not only answer my surface level questions but also tried to uncover any underlying needs that may place me in a better product.
6. Was patient and remained friendly throughout most the conversation.
7. There were no transfers needed. The call center agent was knowledgeable enough to answer my questions.
8. The employee was not able to answer any questions. Put me on hold to ask if she could help me, then said she would transfer me to a manager. Manager was not available.
9. The individual was friendly and offered to have someone call me back at a later time.
10. The employee was very nice and listened to what I was asking for.
11. The banker was pleasant but went right into products when I said I was interested in opening an account.
12. Positive experience is they were able to answer my questions without placing me on hold
13. The person who answered the phone was very pleasant but did not know anything about the products other than they had several. She got my info and said that someone would call me back. The person that called back did know the products and asked a few questions.
14. Quick answer, short hold time, only 1 transfer.
15. The positive experience was that the gentleman who answered was knowledgeable about the products. He recommended a Access checking account.
16. The on hold experience was upbeat and informative. Also, the employee wasn't confusing to listen to.
17. The employee was knowledgeable and personable
18. The branch manager was the representative on the phone and was very helpful/kind.
19. She was very nice.
20. The lady on the phone was very nice and quick to provide answers.
21. They were nice & freindly
22. Yes, but employee was a little rocky with delivery the products. You could still she was reading from the screen.
23. The personal banker was friendly and asked a lot of questions, not only about my banking needs but about me personally. Very knowledgeable about the products and services.
24. The employee seemed to be happy to help mad and I didn't feel rushed at all.
25. The woman who answered the phone remembered my name and addressed me by my name throughout the call. She asked several questions to tailor the services discussed to me and my needs.
26. I think the employee was preoccupied as it was close to the end of the day.
27. I called at 4:45pm, and even though it was end of the day, I was treated very well.
28. she had a pleasant voice
29. Cathy was very friendly and knowledgeable. And listened to what I was looking for.
30. She took her time with me and didn't make it feel rushed.



Q15

## What was negative about the experience?

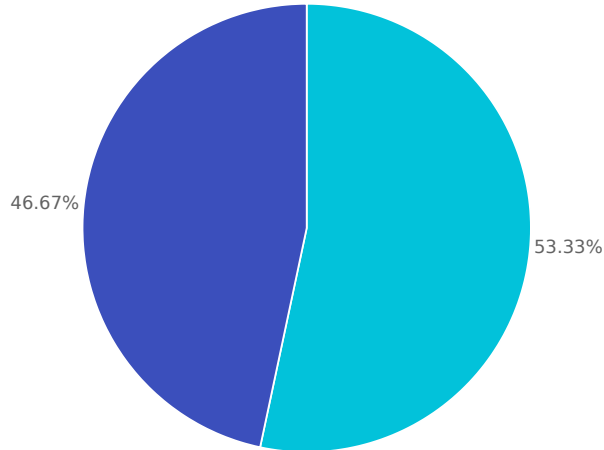
Answered: 30 Skipped: 0

1. She was very general about products and information. It felt like she gave me the bare minimum.
2. None - Best Shop Ever!
3. Did not elaborate on any other products that I would benefit from.
4. I could only open the account in person and the lobby was not open on Saturday's to open new accounts. Even though I called the local branch phone number I was speaking to someone an hour away that didn't really know much about my local location.
5. N/A
6. You could kind of feel that it was a sales type atmosphere.
7. None
8. Got zero information
9. The individual did not identify the bank or department she was associated with. I called the branch phone number, from the bank's website, and when asking the individual for information on the accounts, she stated that no bankers were available at the time to discuss account options but that I could leave a number to receive a call at a later time. I was not sure what part of the branch the individual was a part of, but she did not offer any information at all about accounts options and I did find it odd that the individual answering the phone wasn't able to answer any preliminary questions.
10. N/A
11. Asked a one question about the type of deposit and then proceed with accounts and credit card.
12. multiple disconnections, employee did not make it seem they would like my business
13. Someone did call me back but it was the next afternoon (24 hours later). She seemed to know her products but she did not ask a lot of questions to find out exactly what was right for me.
14. The employee felt rushed to get off the phone like she was pre-occupied or trying to multi-task while talking to me.
15. The negative experience was the lack of personal connection. The experience felt Robotic.
16. After asking a question, the employee's voice turned sharp to specify nuances of answer. This seemed startling.
17. The hold announcement
18. Took a little bit to get someone on the phone and I personally felt bad wasting their time.
19. She assumed I was not over the age of 55. Which I am not, but to phrase it the way she did I dont think you are eligible for this last type of account, just was negatively phrased.
20. Could hear drive thru customers asking her questions and her responding.
21. Seemed scripted
22. No
23. Could have asked more deeper questions about my account usage and how I access my accounts.
24. The employee didn't seem to feel the need to guide me to what may fit my needs best.
25. She did not seem to have a super in-depth level of understanding of each service but she gave me the basic, essential information.
26. The employee never asked my name.
27. N/A
28. she didnt try and transfer me, she just told me to call another branch
29. nothing
30. Nothing.

Q16

### Next Steps - did they leave you with options/follow-up?

Answered: 30 Skipped: 0



Yes

● No

Choices	Response percent	Response count
Yes	53.33%	16
No	46.67%	14
Explain.		25

#### Explain.

1. At the end of the call she asked if there is anything else she could do, when I thanked her and told her not at this time she told me to have a good day and we ended the call.
2. He explained what I needed to open the account and then offered the business stating he could open the account. I told him I wanted to wait and he then asked for my name and phone number to follow up.
3. They described a few different accounts and told me contact them when I wanted to proceed with opening an account.
4. They let me know my options should I want to proceed with an account with them. They let me know what to expect with regards to turnaround time. They also emailed me a follow-up so that I have their contact information.
5. Email to send information to as well as where the closest branch to me is located and who to see if I where to go there.
6. Offered for me to open the checking account online, over the phone, or in a branch. If I needed the associated debit card right away they could mail it to me or I could come into the branch to get one issued immediately.
7. Offered to call me back.
8. She did say I could call back at a later time or leave my number to get a call back when they had a chance.
9. I told them I would call back if I decided to open an account.

10. If I would like to open an account I could go online or come into the branch in which will close at 6 today.
11. No options, no follow up, just a Thanks for Calling and done.
12. They told me about several accounts and their benefits and left me with her name but that anyone in the branch would be able to help
13. He left the ball in my hands for the a follow up. He didn't ask me for my contact information. I didn't feel as though he cared whether or not he got my business.
14. Most of the burden was put on me to inquire about the products.
15. Option to convert checking account to different type depending on needs.
16. Just told me if I wanted an account to come in.
17. Just stated to feel free to call back or stop by for more info
18. They asked if they could follow up at the end of the week to see if I was ready to open an account.
19. The employee advised me of which branch would be closest for me and the name of who I should talk to.
20. She asked me if I would like to come in to discuss my options further and told me someone could sit down with me and go over the best options for me. She told me how to set up an appointment online and told me they look forward to seeing me soon :).
21. The employee told me that I could come in open the account if I wanted to.
22. We decided it was best for me to make an appointment and come in.
23. n/a
24. I told her I had to speak to my husband about it. I asked if I could call back tomorrow and she said yes I will be here 830-5.
25. She asked if I wanted to set an appointment to come open the account.

Q17

## Lasting impression of the experience?

Answered: 30 Skipped: 0

1. She was positive, and had a welcoming tone. She used my name often which made me feel important, but then was general with the information she offered me.
2. I could not believe how great Josh made Primis seem. He made me want to bank there.
3. Very pleasant-Knew the different checking accounts.
4. Overall was positive but he did not go out of his way to get me to open an account.
5. They were very attentive and willing to help. They made sure that all my needs were accounted for and also offered other products outside of an account in case this was ever a need or interest of mine.
6. I felt that this particular bank is involved in sales as well as cross selling however they are not pushy and go about it in a friendly and respectful manner.
7. This institution puts forth effort to make the customer experience simple and easy.
8. Won't be using that bank if I can avoid it.
9. I probably wouldn't call back if I was looking for an account. If I had left my number, I likely would have pursued different options regardless as she was not able/did not offer to provide any beginning information.
10. Still friendly and helpful and also understanding.
11. None except they needs to slow down.
12. I don't think this particular bank is interested in me opening an account or any other John Doe on the street.
13. Not impressed. I thought it took too long to return a call when I was thinking they would call back the same day. The person that answered the phone should have been able to give me some info on the accounts they offered.
14. I felt that I had all of my questions answered and that they had a product that would best fit my needs. One of the two employees I talked to was very rushed acting on the phone which was a turn off - I almost felt like I was bothering her. The 2nd employee who I was transferred to was very pleasant and explained their products to me.
15. My lasting impression of the experience is that I would not be opening an account there. I would continue to shop for a bank that was more personable.
16. The experience overall was rushed. It wasn't terrible, but not personable.
17. Pleasant
18. Very good.
19. She was nice and informative.
20. Pushed basic account but didn't ask questions to determine what I wanted out of the account. I appreciated she was hard working but trying to help drive thru and answer my questions at same time made me feel rushed.
21. Not really. Basic
22. Overall a good experience. I'm thinking the employee was newer. She put me on hold for a little bit and then deliver the info I needed.
23. Very customer oriented. I could tell they wanted what best for me and asked questions to find the best fit.
24. Overall, very positive. The employee didn't mind answering any of my questions and was very pleasant.
25. It was overall a positive and straight forward call and experience. I could have maybe received a little more information but I'm also not sure I quite knew what I was asking for so that probably would have helped a little as well.
26. Probably not the bank for me.
27. Overall, a great experience. I would be happy as a prospective customer
28. unprofessional and inconvenience.

29. Very helpful, kind, accommodating.

30. Overall, I'd open an account with them if I didn't work here.