

TDB: Customer Follow-up Request: Low score - goes to next state in 12 hours NEW



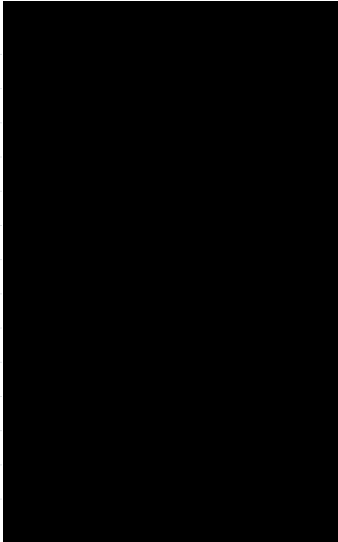
[Redacted]

January 14, 2023, 6:15 PM EST

[Respond](#) [Assign Alert](#) [Close Alert](#) [Add Note](#)

Profile

- Alert Type
- Alert Reopened
- Survey Program
- Sub Program
- Survey Type
- Team/Unit
- Employee ID
- Multi-Location
- TDB: Region
- Regional Operations Officer
- Market
- Retail Market President
- Metro Market
- Shop/BM Start Date
- Survey ID



Response Date	01/14/2023, 06:15 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

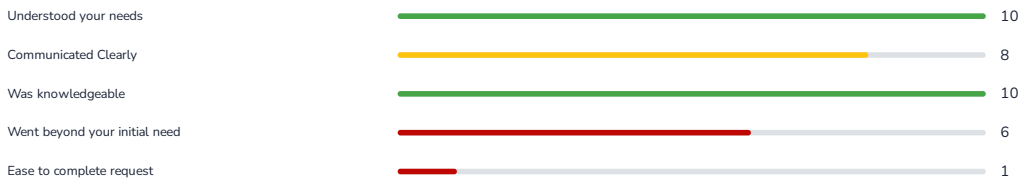
- Alert status set to New**
01/14/2023, 6:15:45 PM EST - System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
01/14/2023, 6:15:35 PM EST - System Generated
EE/B

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Other text
Atm


Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

Comment

 Ease comment
I had to go to Montpelier, because you closed our Waitsfield branch! Your atm is grossly inadequate. This is a 4 season resort town with visitors from around the country. You maintained the branch in Stowe but closed ours what were you thinking?

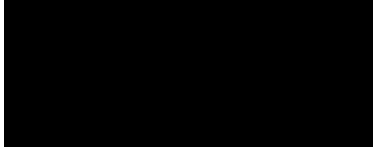
Overall Comments
Reopening a local branch

Other text
Atm

Reason for Scores
Fast and courteous



January 18, 2023


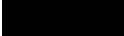


Dear 

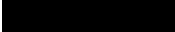
Thank you for your recent communication regarding the consolidation of our Store located in Waitsfield, VT. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

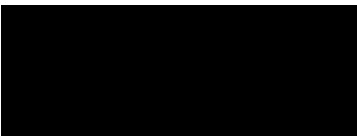
We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week 

- And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at 

Sincerely,



Retail Market Manager VT

TD Bank, America's Most Convenient Bank

TDB: Customer Follow-up Request: Low score - goes to next state in 31 hours NEW



[Redacted]

March 6, 2023 at 4:50 PM EST

Respond ▾ Assign Alert Close Alert Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Employee ID	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	03/06/2023, 04:50 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

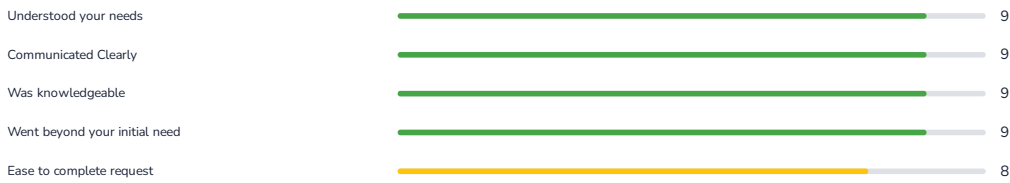
- Alert status set to New**
03/06/2023, 4:50:42 PM EST · System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
03/06/2023, 4:50:34 PM EST · System Generated
EE/B

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

Comment



Reason for Scores

🔴 The TD Branch location in Olden Avenue in Ewing has unacceptably long wait times. 🔴 It is chronically understaffed. 🔴 I've waited in the drive through for up to 40 minutes in the middle of the afternoon on a weekday. 🔴 Ever since the Pennington branch was closed, the lines at this location have been astronomical and there are no other locations within a 20 minute drive.



March 8, 2023

[Redacted]

Dear [Redacted]

Thank you for your recent communication regarding the consolidation of our Store located in Pennington. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [Redacted]
- And a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [Redacted].

Sincerely,

[Redacted]

TD Bank, America's Most Convenient Bank

[Redacted]

[Redacted]

Digital: Customer Follow-up Request: Low score - goes to next state in 28 hours NEW



[Redacted]

September 19, 2023 at 3:46 PM EST

[Respond](#) [Assign Alert](#) [Close Alert](#) [Add Note](#)

Profile

Alert Type	[Redacted]	Response Date	09/19/2023, 03:46 PM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
Survey ID	[Redacted]	Customer phone number	[Redacted]
		Customer email	[Redacted]
		Survey Language	[Redacted]
		Survey Status	[Redacted]

Actions Taken

Alert Created: Digital: Customer Follow-up Request: Low score
 09/19/2023, 3:47:27 PM EST · System Generated
 EE/IB

Key Metrics and Attributes

LEI Score Breakdown

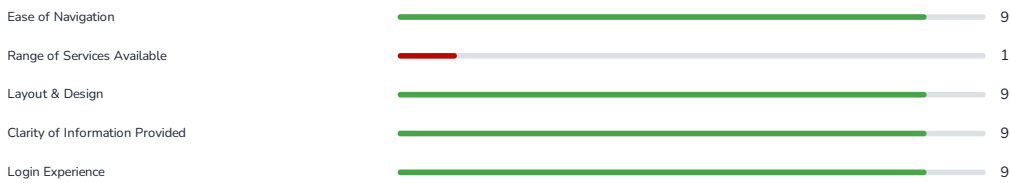


Attributes



Operating metrics and additional client information

Factors Responses



Privacy opt-ins

Privacy opt-in Yes No

Comment

Overall Comments
 🚫 NOT Americas most convenient bank!!!!!!!!!!!!!!!

From: [REDACTED]
To: [REDACTED]
Subject: Your TD Bank Survey
Date: Monday, September 25, 2023 7:22:35 AM

Dear [REDACTED]:

Thank you for your recent communication regarding the consolidation of our Store located at Tryon. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to the same legendary Customer experiences and choices that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24/7 [REDACTED]

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank. We'd be happy to discuss them further at your convenience.

The local team is ready and here for you! Please feel free to reach out so that we can personalize solutions regarding your banking needs at [REDACTED]

Sincerely,

[REDACTED]
Customer Advocacy and Insights, Office of the CEO
TD Bank, America's Most Convenient Bank®

Internal

Digital: Customer Follow-up Request: Low score - goes to next state in 95 hours NEW



[Redacted]

September 22, 2023 at 9:22 AM EST

Respond | Assign Alert | Close Alert | Add Note

Profile

Alert Type	[Redacted]	Response Date	09/22/2023, 09:22 AM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
Survey ID	[Redacted]	Customer phone number	[Redacted]
		Customer email	[Redacted]
		Survey Language	[Redacted]
		Survey Status	[Redacted]

Actions Taken

- Alert Created: Digital: Customer Follow-up Request: Low score**
09/22/2023, 9:23:21 AM EST · System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Operating metrics and additional client information

Factors Responses



Privacy opt-ins

Privacy opt-in Yes No

Comment

Reason for Scores

- TD Bank has closed branches, have ATMs out of order and is increasing fees.
- You're trying to force everyone to bank on-line. On-Line Banking is not exactly the safest environment.
- In the West Dover section of Toms River, you have disenfranchised Senior Citizens making it more difficult for them to do banking.
- You refuse to drop your fee when we can use a PNC Bank ATM at WAWAs and Quick Checks for free.
- and your motto, "America's Most Convenient Bank" is a joke among customers.
- The only question I have is, why do I continue to be a TD Bank customer.
- Not happy.

From: [REDACTED]
To: [REDACTED]
Subject: Your TD Bank Survey
Date: Thursday, September 28, 2023 5:49:32 PM

Dear [REDACTED]

Thank you for your recent communication regarding the consolidation of our Stores located at Toms River area. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to the same legendary Customer experiences and choices that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24/7 [REDACTED]

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank. We'd be happy to discuss them further at your convenience.

The local team is ready and here for you! Please feel free to reach out so that we can personalize solutions regarding your banking needs at [REDACTED]..

Sincerely,

[REDACTED]

Office of the President and CEO

TD Bank, America's Most Convenient Bank ®

Internal

TDB: Customer Follow-up Request: Low score - goes to next state in 76 hours NEW



[Redacted]

September 21, 2023 at 2:39 PM EST

Respond ▾ Assign Alert Close Alert Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Employee ID	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	09/21/2023, 02:39 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

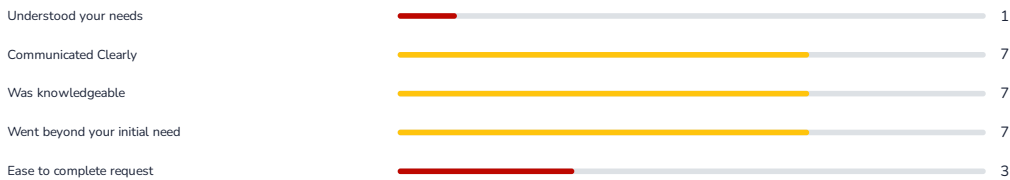
- Alert status set to New**
09/21/2023, 2:40:14 PM EST · System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
09/21/2023, 2:40:03 PM EST · System Generated
EE/B

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No


Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

Comment

 Ease comment
 Listen to customers

Overall Comments
 Relationship building

Reason for Scores
 No Community outreach.

First Contact Date: 9/22/2023

Contact Type: **Letter or Email Requesting Contact**

Response Type: **Verbal**

Response Type Detail: **Phone Conversation**

Resolution Date/Time: 9/26/2023

Resolution Entered By: [REDACTED]

Resolution Details:

The SM, [REDACTED], spoke with [REDACTED] today, 9/26 @ appx 9:00am. The SM, knows Mr. [REDACTED] very well. [REDACTED] is the Executive Director of the Tamarac Chamber of Commerce. Recently, the SM sent [REDACTED] a link to apply for sponsorship for an event the chamber was hosting and [REDACTED] received a reply back that he did not qualify. [REDACTED] received the LEI survey at the same time he received his response from TD for sponsorship and since he was very disappointment with the reply from TD Bank, he wanted us to know how he felt.

[REDACTED] wanted to ensure that it was noted that the staff at the Tamarac store are great and the survey had nothing to do with his experience with the store. [REDACTED] did want to reach out to the RMM, [REDACTED] about this; however, the SM stated she would discuss with the RMM. Mr. [REDACTED] also wanted TD to join the Chamber and the SM informed [REDACTED] he would speak with the RMM regarding this.