

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

NEW

January 14, 2023, 6:15 PM EST

Respond

Assign Alert

Close Alert

Add Note

Profile

Alert Type	TDB: Customer Follow-up Request: Low score	Response Date	01/14/2023, 06:15 PM
Alert Reopened	No	Creation Date	01/14/2023, 02:10 PM
Survey Program	TDB Store	Transaction entry date	01/13/2023
Sub Program	TDB Teller	TDB Customer type	Consumer
Survey Type	Digital - BAU	Customer full name	
Team/Unit		Email name	
Employee ID		Customer phone number	
Multi-Location		Customer email	
TDB: Region	Vermont	Survey Language	English
Regional Operations Officer		Survey Status	COMPLETED
Market	Northern New England	Included in LEI Score	Yes
Retail Market President			
Metro Market	Metro New England		
Shop/BM Start Date	12/01/2010		
Survey ID			

# 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/IB

Key Metrics and Attributes

LEI Score Breakdown

Exceptional Experience		10
Increase Business		1

Attributes

Understood your needs		10
Communicated Clearly		8
Was knowledgeable		10
Went beyond your initial need		6
Ease to complete request		1

Page 1 of 2

## 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

[REDACTED]  
[REDACTED]  
[REDACTED]

Dear Mr. Eardensohn,

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 [REDACTED]  
[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]

[REDACTED]

[REDACTED]

**TD Bank, America's Most Convenient Bank**

Page 1 of 2

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



ROBERT MORGAN

September 19, 2023 at 3:46 PM EST

Respond

Assign Alert

Close Alert

Add Note

Profile

Alert Type

Digital: Customer Follow-up Request: Low score

Alert Reopened

No

Survey Program

TDB Digital

Sub Program

TDB Online

Survey Type

Digital - BAU

Team/Unit

TDB Online

Survey ID

Response Date

09/19/2023, 03:46 PM

Creation Date

09/19/2023, 03:10 PM

Transaction entry date

09/17/2023

TDB Customer type

Consumer

Customer full name

Email name

Customer phone number

Customer email


Survey Language

English

Survey Status

COMPLETED

# 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

Exceptional Experience

10

Increase Business

1

Attributes

Ease to complete request

10

Operating metrics and additional client information

Factors Responses

Ease of Navigation

9

Range of Services Available

1

Layout & Design

9

Clarity of Information Provided

9

Login Experience

9


Privacy opt-ins

Privacy opt-in

Yes

No

Comment



Overall Comments

NOT Americas most convenient bank!!!!!!!!!!!!!!

Page 1 of 1

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

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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 [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]


**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	Digital: Customer Follow-up Request: Low score	Response Date	09/22/2023, 09:22 AM
Alert Reopened	No	Creation Date	09/15/2023, 03:10 PM
Survey Program	TDB Digital	Transaction entry date	09/13/2023
Sub Program	TDB Online	TDB Customer type	Consumer
Survey Type	Digital - BAU	Customer full name	[REDACTED]
Team/Unit	TDB Online	Email name	[REDACTED]
Survey ID	[REDACTED]	Customer phone number	[REDACTED]
		Customer email	[REDACTED]
		Survey Language	English
		Survey Status	COMPLETED

# 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

Exceptional Experience	<div><div></div></div>	1
Increase Business	<div><div></div></div>	3

Attributes

Ease to complete request	<div><div></div></div>	6
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Operating metrics and additional client information

Factors Responses

Ease of Navigation	<div><div></div></div>	8
Range of Services Available	<div><div></div></div>	8
Layout & Design	<div><div></div></div>	8
Clarity of Information Provided	<div><div></div></div>	8
Login Experience	<div><div></div></div>	9


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.

Page 1 of 1

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

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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]  
[REDACTED]

**TD Bank, America's Most Convenient Bank ®**

Internal

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

NEW

September 21, 2023 at 2:39 PM EST

Respond

Assign Alert

Close Alert

Add Note

Profile

Alert Type	TDB: Customer Follow-up Request: Low score	Response Date	09/21/2023, 02:39 PM
Alert Reopened	No	Creation Date	09/21/2023, 02:10 PM
Survey Program	TDB Store	Transaction entry date	09/20/2023
Sub Program	TDB Teller	TDB Customer type	Consumer
Survey Type	Digital - BAU	Customer full name	
Team/Unit		Email name	
Employee ID		Customer phone number	
TDB: Region	Gold Coast	Customer email	
Regional Operations Officer		Survey Language	English
Market	South Florida	Survey Status	COMPLETED
Retail Market President		Included in LEI Score	Yes
Metro Market	Florida		
Shop/BM Start Date	12/01/2010		
Survey ID			

# 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/IB

Key Metrics and Attributes

LEI Score Breakdown

Exceptional Experience		3
Increase Business		1

Attributes

Understood your needs		1
Communicated Clearly		7
Was knowledgeable		7
Went beyond your initial need		7
Ease to complete request		3

Page 1 of 2

**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 [REDACTED] very well. [REDACTED] is the [REDACTED]. 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. [REDACTED] also wanted TD to join the Chamber and the SM informed [REDACTED] he would speak with the RMM regarding this.

[REDACTED]

**From:** [REDACTED]  
**Sent:** Friday, October 13, 2023 2:34 PM  
**To:** [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** FW: T [REDACTED] - Twitter X - Customer Complaint - [REDACTED]  
**Importance:** High

Good Afternoon,

Please see the below Social Media complaint,

Thank you, The Customer does not wish to be contacted.

[REDACTED]

**TD Bank America's Most Convenient Bank**

[REDACTED]

*Please forward customer complaint related concerns to Account, AMCB USPC Customer Cares*

Confidential

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**From:** [REDACTED]  
**Sent:** Friday, October 13, 2023 2:29 PM  
**To:** [REDACTED]  
[REDACTED]

**Subject:** [REDACTED] - Twitter X - Customer Complaint - [REDACTED]

**Please Note: SLA (Customer Contact) is due within 24 hours from the date and time the original email is sent from Social Media Team.**

#### Customer Information

<b>Customer Name</b>	[REDACTED]
<b>Contact Information</b>	N/A
<b>Customer Influence</b>	[REDACTED]
<b>Account Number</b>	N/A
<b>Social Channel</b>	Twitter
<b>Twitter X Handle/Facebook Name</b>	[REDACTED]

#### Store Information

<b>Store Name &amp; Address</b>	[REDACTED]
<b>Market</b>	New York
<b>Market President of Retail</b>	[REDACTED]
<b>Retail Market Manager</b>	[REDACTED]

#### Detail Summary

We were contacted regarding the Customer's frustration with their local TD Bank Store. According to [REDACTED], hours at the Forest Hills/Metropolitan Store have recently been changed to less convenient hours. The Customer also states that the Store's ATM is currently unavailable due to upgrades being made.

The Customer recently had to take cash out at a CVS due to the new hours and lack of ATM access.

As this is the closest Store to them, the Customer feels that the Store hour changes and the ATM outage are ridiculous. They also state that they do not have time to locate another nearby Store or TD ATM

The Customer does not wish to be contacted, but wanted their complaints heard.

#### Conversation History

##### Public Tweets 10/13/23

[REDACTED] 8:17 AM

@TDBank\_US so first you change your store hours so you are no longer convenient and now the atm at the closest branch to me is closed for upgrades. Ridiculous

[REDACTED] 8:19 AM

Good morning, [REDACTED] We take your feedback seriously and are happy to discuss with you if you'd like to send us a DM. For your security, please don't include account information. [REDACTED]

**Direct Messages**  
**10/13/23**

**9:51 AM**

Hello. I am very frustrated with TD Bank these days. First the hours changed and then the local atm at the one branch seems to be down for upgrades. I was unable to take out cash this morning at a local TD bank and ended up having to go to a cvs so I could get cash this morning. I did not have time to find another TD bank with an atm.

**TD Routing 9:51 AM**

Thank you for contacting TD Bank, America's Most Convenient Bank. For your own security and safety, never send personal or confidential information (account numbers, PIN numbers, usernames, passwords or any other confidential information) through this forum. Please note, we may request contact information in order to further assist you. Conversations may be retained.

**9:54 AM**

Hi, [REDACTED] Thank you for following up with us to discuss. Would you kindly confirm the Store location in question so we can look into your concerns? [REDACTED]

**10:00 AM**

This is the location



10110 Metropolitan Ave, Que

**10:03 AM**

Thank you for confirming. We take your concerns seriously and would like to help resolve them. If you would like to confirm your name as it appears on your account and a phone number you may be reached at, I can escalate this to our Leadership Team. They can review this and follow up with you within 24-48 hours. [REDACTED]  
We haven't heard back from you yet, but we're here until 11 pm ET if you still need our assistance. Thank you for connecting with TD Bank, U.S. I hope you enjoy your day - Stay safe and take care! [REDACTED]

**12:45 PM**

I do not want to provide my name or email address for this purpose. As a loyal customer to TD bank I had wanted to express my frustrating experience with this atm and the beach hours

**TD Routing 12:45 PM**

Thank you for contacting TD Bank, America's Most Convenient Bank. For your own security and safety, never send personal or confidential information (account numbers, PIN numbers, usernames, passwords or any other confidential information) through this forum. Please note, we may request contact information in order to further assist you. Conversations may be retained.

**12:52 PM**

Hey, [REDACTED] Even though you do not wish to be contacted, we do take this seriously and can assure you that this is being escalated. [REDACTED]

**2:11 PM**



We have escalated your concerns to our Leadership Team for further review, with the case number [REDACTED] Thank you! [REDACTED]

[REDACTED] [REDACTED] [REDACTED]  
**TD Bank, America's Most Convenient Bank**  
[REDACTED]  
[REDACTED] [REDACTED]