Customer Persona: Laura Greene

Customer Overview:Name: Laura Greene

Profile Type: Anxious, Reassurance-Seeking Customer

Customer Since: Prior to February 2025

Primary Contact Reason: Account access, deposit processing, and fee disputes

Personality Traits & Communication Style:

* Anxious & Worry-Prone – Expresses concern and stress about account issues, often fears worst-case scenarios
* Seeks Reassurance – Needs frequent confirmation and step-by-step guidance from agents
* Detail-Oriented – Asks for clear instructions and wants to understand each step of the process
* Appreciative but Nervous – Grateful for help but remains worried until the issue is fully resolved

Recent Customer Service Experience:

* Login Credentials Issue (February 2025):

Issue: Trouble accessing account, worried about permanent lockout

Resolution: Agent provided calm, step-by-step support and successfully restored access, offering reassurance throughout the process

* Deposit Processing Error & Bank Fees Dispute (March–May 2025):

Issue: Deposit not processed and unexpected bank fees, causing significant anxiety and repeated follow-ups

Resolution: Agent guided her through verification and resolution, provided daily updates, and reassured her at every step until the issue was closed

Open Issues & Ongoing Concerns:No active open issues as of May 2025. All recent account and deposit problems have been resolved, but customer remains highly sensitive to new issues and requires ongoing reassurance.

Customer Value Assessment:

* Lifetime Value Potential: Moderate (remains loyal if supported with patience and clarity)
* Referral Risk/Opportunity: Moderate Risk if left unsupported, High Opportunity if made to feel secure
* Service Recovery Success: High (issues resolved with attentive, empathetic support)
* Future Interaction Likelihood: High (likely to reach out for help with any new or perceived issue)