



#### DURATION

eLearning	2 - 3 hours
Classroom	1 day



#### DELIVERY CHANNEL

Blended



#### eLearning Course Lessons

- 1 Deepening Customer Connections
- 2 Follow-up Calling
- 3 Follow-up Meeting Preparation

Blended

## Advancing Customer Connections

EXPAND PERSONAL BANKING RELATIONSHIPS DURING ONE-TO-ONE MEETINGS

### COURSE OVERVIEW & BENEFITS

You've established a relationship with your personal banking customer. Now, it's time to grow it.

Advancing Customer Connections (ACC) teaches branch bankers and managers how to prepare for and execute high-value, customer-focused follow-up meetings to strengthen and expand the personal banking relationship.

ACC expands upon the skills taught in Building Customer Connections. It begins with a short eLearning course that emphasizes the value in proactively scheduling time to meet to discuss a customer's needs and explore the overall financial picture. Participants review strategies for conducting a pre-meeting "confirmation call" to cement the agenda and address any resistance the customer may have to the upcoming meeting. They also learn approaches for successfully preparing for and conducting the meeting.

Upon completion of the eLearning course, participants are eligible to attend the one-day Advancing Customer Connections: Skills Application Lab. During this facilitated session, they spend the morning developing skills in pairs and small groups, and the afternoon demonstrating both a confirmation call and a follow-up meeting during a video-recorded skill practice.

Advancing Member Connections, a credit union-focused version of this course, is also available.

### LEARNING OBJECTIVE

Strengthen personal banking relationships with customers by exploring their overall financial picture and identifying ways that the financial institution can further meet their saving, investing and money management needs.

### COMPETENCIES GAINED

#### Participants will be able to:

- Use planning tools to prepare for follow-up meetings with customers
- Ask high-impact questions to identify the customer's immediate and emerging financial needs, current financial relationships and future financial needs
- Recommend solutions that meet the customer's specific needs
- Establish deeper connections with customers, strengthening their relationship with the financial institution

### TARGET AUDIENCE

ACC is suitable for branch managers, branch bankers, personal bankers and sales and service associates who have completed Building Customer Connections.