



DURATION

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| eLearning | 2 - 3 hours |
| Classroom | 2 days |



DELIVERY CHANNEL

Blended



eLearning Course Lessons

- 1 Relationship Building
- 2 CON²ECT: Connect with Member
- 3 CON²ECT: Open Dialogue
- 4 CON²ECT: Note²
- 5 CON²ECT: Explain Solution
- 6 CON²ECT: Complete Request
- 7 CON²ECT: Transition and Show Appreciation

Blended

Building Member Connections

STRENGTHEN PERSONAL BANKING RELATIONSHIPS ONE CONVERSATION AT A TIME

COURSE OVERVIEW & BENEFITS

In today's competitive personal banking environment, your associates are playing an increasingly important role in whether consumers choose your organization for a long-term relationship.

Building Member Connections (BMC) teaches personal bankers and branch managers how to have meaningful conversations that build loyal relationships and earn additional business for your financial institution. This blended learning solution begins with a short eLearning course that introduces participants to the six-step CON²ECT Member Experience Model. When they learn about each step, participants are provided with a demonstration of "what good looks like." As they reach the model's final steps, they are also introduced to the Handling Objections Model and TAG Additional Needs Model, both of which help participants take conversations to the next level in ways that demonstrate genuine concern for the member's financial success.

After they've completed the eLearning course, participants are eligible to attend the two-day Building Member Connections: Skills Application Lab. During this facilitated training event, participants—having familiarized themselves with the models ahead of time—are able to devote nearly 100% of their time to practice.

LEARNING OBJECTIVE

Learn how to conduct memorable, engaging conversations that skillfully address the member's immediate need and uncover additional needs that your financial institution can meet.

COMPETENCIES GAINED

Participants will be able to:

- Increase member satisfaction, retention and loyalty by engaging and bonding with members
- Ask effective questions to explore the member's immediate need and uncover additional needs
- Follow a model to "TAG" additional needs so that they can be addressed either during or after the member's initial visit
- Explain solutions by linking the member's needs to the right products and identifying the relevant benefits of those products
- Handle objections in a way that acknowledges the member's reservations and demonstrates commitment to member satisfaction

TARGET AUDIENCE

BMC is suitable for branch managers, personal bankers and sales and service associates.