

Blended

Creating Customer Connections

BUILD EXCEPTIONAL CUSTOMER SERVICE SKILLS AT THE FRONTLINE



DURATION

eLearning 2 - 3 hours

Classroom 1 day



DELIVERY CHANNEL

Blended



eLearning Course Lessons

- 1 Connecting with Customers
- 2 Asking Effective Questions
- 3 Expediting the Customer's Request
- 4 Identifying Need Cues
- 5 Making Effective Referrals

COURSE OVERVIEW & BENEFITS

Your frontline staff are the face of your organization, and you can be certain that customers will notice whether they're capable, confident and genuinely invested in providing the best service possible.

Creating Customer Connections (CCC) teaches frontline staff how to create exceptional customer experiences that differentiate your financial institution from its competitors and set the stage for loyal, lasting relationships.

This blended learning solution begins with a short eLearning course that introduces the CON²ECT Customer Experience Model—a practical, six-step model designed to be used during every customer interaction. Participants also learn how to recognize need cues—and once the customer's initial request has been met—"TAG" those cues in order to make customer-centered referrals.

Upon successful completion of the eLearning course, learners are eligible to attend the Creating Customer Connections: Skills Application Lab, a one-day, facilitated training event that provides an opportunity to gain experience and confidence in applying what they've learned. As they're guided through a variety of paired, small-group and large-group activities, participants are encouraged to see themselves as consultative bankers interested in the best outcomes for their customers.

The day culminates in a peer-to-peer, audio-recorded skill practice that gives each learner the opportunity to carry out an entire customer conversation and receive specific feedback.

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

LEARNING OBJECTIVE

Learn how to develop lasting personal banking relationships by expediting service transactions in a friendly, efficient and consultative manner.

COMPETENCIES GAINED

Participants will be able to:

- Increase customer satisfaction, retention and loyalty by engaging customers in ways that differentiate their financial institution
- Efficiently explore and expedite the customer's immediate request
- Recognize customer cues that may indicate the need for additional products and services
- Make quality referrals to partners within the branch and other lines of business

TARGET AUDIENCE

CCC is suitable for tellers and teller managers.