

Secrets of Successful Service Syllabus



Course Description

Secrets of Successful Service teaches tellers and front-line, service personnel to provide clients with exceptional service by recognizing their financial needs and referring appropriately. This course explores the skills required to achieve GREAT referrals.

Target Audience

For all branch transactional and customer service front-line staff.

Course Length

Secrets of Successful Service is a half-day seminar.

Prerequisites

There are no prerequisites. However, a knowledge of bank products is recommended.

Learning Objectives

After successfully completing this seminar, participants will be able to make GREAT referrals.

G Get Clients Talking

Engage clients in pleasant conversation about common interests.

Use casual conversation as a way to demonstrate interest to clients and open the door to discussions about financial needs.

R Recognize Opportunities

Recognize the importance of helping clients satisfy investment and credit needs that clients themselves may be unaware of.

Identify what clients say and do that indicates a need for an additional product or service.

Seek clues in a client's relationship history that provide information about a potential need.

Ask questions to clarify needs before suggesting products or services.

E Elicit Positive Responses

Enhance a conversation when a client has expressed a lack of interest in additional products and services.

Create brief "sound bites" to explain what a product is and how it benefits a client.

Answer client concerns and objections effectively.

A Ask to Introduce

Provide referrals with follow-up that assure the receiving associates that clients are expecting their phone call.

T The Secret Ingredient

Develop strategies to help persevere to achieve GREAT referrals.



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