



## DURATION

4 - 5 hours



## DELIVERY CHANNEL

eLearning

## LESSONS

1. The Customer Experience
2. Establishing a Connection
3. Exploring Needs
4. Explaining Solutions and Completing the Request
5. Supporting a Seamless Customer Experience
6. Advancing the Relationship

# Elevating the Customer Experience

DELIVERING VALUE IN AN EVOLVING RETAIL BANKING LANDSCAPE

## OVERVIEW

Retail banking customers are increasingly able – and content – to complete routine transactions online, and as a result, they're having fewer interactions with financial center personnel. That means when they do visit the financial center, it's more important than ever that employees can deliver exceptional service and reinforce the institution's position as a partner in their long-term financial well-being.

The Elevating the Customer Experience eLearning course teaches frontline bankers to approach each financial center visit as an opportunity to build meaningful, long-lasting relationships. It begins by exploring the current retail banking landscape and the role that frontline bankers play in supporting a cohesive omnichannel experience.

Using real-world examples and rich practice exercises – including learner-directed simulations – it then examines each facet of a customer interaction, emphasizing the importance of thoroughly exploring the customer's immediate need and treating the conversation as an opportunity to detect and discuss additional needs.

Next, it explores the steps that frontline bankers can take to support a seamless customer experience, both by improving their communication with co-workers and supporting customers as they navigate the financial institution's physical and digital channels.

The course concludes by teaching participants how to plan for and execute followup appointments to explore the customer's overall financial picture, form a plan to address developing needs, and surface unrecognized needs that the financial institution can meet.

## LEARNING OBJECTIVE

Learn how to enrich customers' banking experiences by providing excellent service and uncovering opportunities to deepen relationships during financial center visits.

## PROFICIENCY GAINS

- Recognize customers' expectations of the financial center experience and financial center employee.
- Explore the customer's immediate need and identify the need cues that surface during the conversation.
- Recognize and explore the needs that commonly arise at different stages of the customer's life.
- Identify best practices for recommending solutions and handling objections.
- Promote a seamless experience by improving communication with internal partners and supporting customers as they transition between delivery channels.
- Schedule and conduct follow-up appointments to further uncover and explore immediate, developing, and unrecognized needs.

## TARGET AUDIENCE

- Branch bankers
- Branch managers
- Personal bankers
- Universal bankers
- Tellers