



DURATION

4 - 5 hours



DELIVERY CHANNEL

eLearning

LESSONS

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

Elevating the Member Experience

DELIVERING VALUE IN AN EVOLVING RETAIL BANKING LANDSCAPE

OVERVIEW

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

The Elevating the Member Experience eLearning course teaches frontline personnel to approach each in-person visit as an opportunity to build meaningful, long-lasting relationships. It begins by exploring the current retail banking landscape and the role that frontline personnel 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 member interaction, emphasizing the importance of thoroughly exploring the member's immediate need and treating the conversation as an opportunity to detect and discuss additional needs.

Next, it explores the steps that frontline personnel can take to support a seamless member experience, both by improving their communication with co-workers and supporting members as they navigate the credit union's physical and digital channels.

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

LEARNING OBJECTIVE

Learn how to enrich members' banking experiences by providing excellent service and uncovering opportunities to deepen relationships during in-person visits.

PROFICIENCY GAINS

- Recognize members' expectations of the credit union experience and the credit union employee.
- Explore the member'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 member's life.
- Identify best practices for recommending solutions and handling objections.
- Promote a seamless experience by improving communication with internal partners and supporting members 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