



Bank Call Center Customer Service Training Sample

Issues

The Difficult Customer.

A customer is calling in a rage. He had some checks bounce because the service fees were higher than his remaining balance. What do you tell this "unbalanced" man?

Sample
Game
Cards

(smaller
than the
Actual
3 1/8" by
2 1/4" size)

CSR Basics.

You answer a call from a gentleman complaining about the service he has received from one particular branch. What is the procedure for taking and routing this complaint?

Customer Security Concerns.

A customer on the phone is requesting that a debit (or check) card be cancelled immediately. The customer suspects that someone has copied his card number and is using it to make mail order purchases. What do you tell the customer?

Setting the Limits.

A person has called you with a request and then puts you on hold. How long will you wait before hanging up on the customer?

Taking the Next Step.

A new customer is calling and asking why her check order has not arrived. You notice that her account is showing considerable activity. What do you say or do?

Standard Operating Procedures #1.

A business customer calls, asking if you would hold one of her checks from processing for a day. She tells you that she is waiting for a cash payment from one of her customers and otherwise she will bounce a number of checks. What is your answer?

Areas of Judgment.

Your bank has a policy of not charging any service fees as long as a minimum balance is maintained. A nice customer is calling to say that she was charged a service fee. Your records show that she fell below the minimum balance one day by three cents. What do you tell this customer?

Standard Operating Procedures #2.

How do you insure that you do not give out account information to unauthorized individuals?