



Bank Internal Customer Service Training

Issues

The Support Perspective.

Your job is to support the front-line teller and CSR staff by providing quick answers and information when requested. Sadly, you are always running over-time because you get a high number of calls just before the end of your shift every day. What do you say, and to whom, to help correct this problem?

Sample
Game
Cards

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

The Front-line Perspective.

You work directly with customers. Each day your busiest time is during lunch and the last hour of the day. You have noticed that some on the support staff are very curt, and you get the feeling that their attitude toward helping you is ruled by the clock. What do you say, and to whom, to help correct this problem?

Understanding the Problem.

Which is worse?

- 1) A front-line staff member asking for help and then leaving the task entirely in your care.
- 2) A front-line staff member making a mistake that you must correct because he or she did not ask for assistance.

Understanding the Need.

A teller is face to face with a customer. She has called you with a request for information. You are going to have to look up the data and return the call. What is one bit of information you might give her right now?

Judging Priorities

A personal banker on the phone needs a lot of information at once. She has a business owner at her desk who suspects his bookkeeper of embezzlement. You have two routine requests pending. What do you tell this personal banker?

The Basics.

Who is your customer?
Describe him or her.

Anticipating Needs.

A teller supervisor calls the accounting department for some information requested by a customer in the lobby. The accounting department's computers are currently down. What should an accounting employee do or say to the supervisor concerning this request?

Investigating Improvement.

As an employee in a support role, what is the one procedure you would want all front-line personnel to know?