



Bank Online Banking Customer Service Training Sample

Issues

Common Service Situations.

A woman is requesting information on her application for an ATM card. It seems that she completed the application at the Web site and claims that ten days have passed with no word. What is your next step and what will you say initially?

Sample
Game
Cards

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

Security Issues.

A woman is on the phone. While attempting to log on to her Internet account she mistyped her password and now cannot seem to get logged onto the system. What will you tell her?

Minor Technical Issues.

A man wants to know if he signs up for Internet access to his accounts, will all of the features of his browser program work as normal. What will you say to him?

Security Meets Sales.

A person is thinking about signing-up for your Online Services. She is asking how you insure that no-one will get her password and transfer funds out of her account. What is your reassuring response?

Technical Service.

A woman claims that while online, she read that she needed 'Cookies' for her online access to work properly. She says her ex-husband disabled the 'Cookies' feature, because he was afraid "hackers use 'Cookies' to invade your computer." What do you say and do to help this woman?

Online Bill-Pay Issues.

A customer has received two consecutive late notices from a finance company. He has his reference number and it appears that a Bill Pay check was never cashed, causing the late pay situation. He wants to know what you can do to solve the problem.

Information Unleashed!

You have an email complaint. A customer noticed that her auto loan payoff grew from Friday evening to Monday morning. She wants to know how she will ever get out of debt if her payoff amount keeps growing! What do you say to her?

Standard Operating Procedures.

What is your procedure for a customer that mistakenly gives an incorrect payee address in the "Online Bill Payment Center?"