



Bank Teller Customer Service Training Vol.1

Issues

Common Situations.

You work at a financial institution. A customer wanted to get information about her account. You gave her a phone number for a 24-hour computer center. She is back, complaining that she cannot navigate the menu system. What do you tell this elderly woman?

Sample
Game
Cards

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

With Regulatory Implications.

Is it acceptable to bend an institution policy for a friend or well-known customer?

Difficult to Handle Situations.

A woman wants to close all of her accounts. You know that she recently had a loan request rejected. What do you say to keep this customer?

Heading Off Problems .

A customer calls complaining that he has received a cancellation notice from the cable TV company because his check did not clear your financial institution. You note that he called and put in a stop payment request. How do you calm this customer?

Some Beyond Your Control?

You are working as a drive-through teller. A customer is complaining that your line is terribly slow. You know that the delay was caused by the previous customer's many requests. How do you respond to this customer?

With Criminal Implications.

You are a customer service specialist. 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?

Questions About Human Motives.

Name two reasons customers won't use an ATM.

A Few Unexpected Situations.

You are a teller at a busy downtown branch. It is payday and the lines are very long. An upset gentleman is complaining about his problems making deposits and paying his bills. He hands you his checkbook, and you notice that he is a customer of a competing bank. How do you handle this situation?