



Credit Union Call Center Member Service Training Sample

Issues

The Difficult Member.

A former member is threatening a lawsuit. He cannot seem to open a new account across the state because our credit union shows that he still owes money on his old account. He says that on three occasions he tried to cancel an automatic bill payment and suspects this is the cause of this problem. What do you need to do to resolve this issue?

Sample
Game
Cards

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

MSR Basics.

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

Member Security Concerns.

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

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 member?

Taking the Next Step.

A new member 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 woman wants to remove her daughter from access to her checking account. This woman is insistent that this change be made immediately. What do you say to this member?

Areas of Judgment.

You are new accounts representative. A member has called, saying that she won't pay for her check printing order because her name is spelled incorrectly. Checking her order, you see that the member made the mistake by her own hand. What do you say or do?

Standard Operating Procedures #2.

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