



Credit Union Internal Member Service Training

Issues

The Support Perspective.

Your job is to support the front-line teller and MSR 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 our members. 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.

What is more important to keeping members happy?
1) The initial impression of front-line personnel.
2) The follow through of delivery by back-office support personnel.
3) Neither. Both are absolutely equal.

Understanding the Need.

A teller is face to face with a member. 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?

Remembering Priorities

An angry member wants to know who was responsible for an error with his account. You are fairly certain you know who and what caused the error. What do you tell this angry man?

The Basics.

Who is your "member"?
Describe him or her.

Following Through.

You instructed a front-line employee how to conduct a particular transaction, only to find out later that the procedure for this type of transaction has changed. While you were unaware of the change at the time, what will you do now?

Investigating Improvement.

A new teller has made a mistake that you have to correct. What would you do?
1) Fix the problem and move on.
2) Inform the teller of the mistake and correct the error.
3) Inform the teller supervisor and leave the matter in his or her hands.