



Credit Union Member Service Training Vol. 1

Issues

Common Situations.

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 member's many requests. How do you respond to this member?

Sample Game Cards

(Shown
smaller than
Actual size)

Tough Situations for All.

A member is furious that his car was repossessed. He tells you that he was overseas on military service. He admits that he didn't warn our institution of this. What do you tell this man?

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 member?

Anticipating Needs.

A member is calling to ask about interest-bearing checking accounts. Name one other bit of information you might have available for this member.

Some Beyond Your Control?

You are the new accounts representative for a credit union. A member is complaining that the interest-bearing checking account you recommended is costing her more money than she is earning because she is not maintaining a high enough balance. What do you tell this lady?

With Criminal Implications.

A suspicious acting member just cashed a check for hundreds of dollars. No sooner had she stepped outside the branch than she complained that she left the cash in the envelope on the counter. She is telling the manager that you or another member must have picked up her money. What would you suggest to solve this problem?

Questions About Human Motives.

Name one reason a person would not want to return a call to the loan center servicing one of her loans.

A Few Unexpected Situations.

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?