



Unit 1 – Introduction to Customer Service

Chapter 1 – Introduction to Customer Service

Chapter Overview

Customer Service Challenges

Benefits of Customer Service

The Importance of Customer Service to the Bank

Standard Branch Greeting and Closing

Chapter Review

Chapter 2 – Bank Customers

Chapter Overview

Who Are Bank Customers?

Bank Customer Needs

Bank Sales Skills

Chapter Review

Chapter 3 – Retail Products

Chapter Overview

Introduction to Products and Services

Types of Account Opening

Product Resources

Consumer Checking Accounts

Business Checking Accounts

Consumer Savings and MMA Accounts

Business Savings and MMA Accounts

Consumer Loans

Credit Cards

Mortgage Loans

Other Retail Products and Services

Commercial Products

Wealth Management Products

Product Jeopardy

Chapter Review



Chapter 4 – Retail Services

- Chapter Overview
- Introduction to Services
- Debit Cards
- Online Banking
- Web Banking
- ATM
- Wire Transfers
- Safe Deposit Boxes
- Negotiable Instruments
- Other Services
- Service Password
- Chapter Review

Unit 2 – Communication Skills

Chapter 1 – Basic Communication Skills

- Chapter Overview
- Defining Communication
- The Importance of Communication
- A Model for Communication
- Verbal Communication
- Nonverbal Communication
- Chapter Review

Chapter 2 – Phrasing

- Chapter Overview
- The Impact of Phrasing
- What Phrasing Communicates
- Converting Negative Phrasing to Positive Phrasing
- Positive Phrasing Practice
- Positive Phrasing Tips
- Chapter Review

Chapter 3 – Listening

- Chapter Overview
- Listening Challenge
- Filtering for Facts
- The LISTEN Model
- Levels of Listening
- Giving Feedback
- Listening Practice
- Chapter Review



Unit 3 – Serving Bank Customers

Chapter 1 – Customer Service Model

Chapter Overview
The Customer Service Model
Greeting Customers
Identifying Customer Needs
Reviewing Documentation
Verifying Customer Identification
Processing Transactions
Finalizing the Transaction
Thanking the Customer
Customer Service Practice
Chapter Review

Chapter 2 – Customer Service Challenges

Chapter Overview
Communicating Complex Information
Handlingirate Customers
Addressing Bank Mistakes
Barriers to Communication
Handling Distraught and Grieving Customers
Communicating That There Is No Answer
Responding to Ultimatums
Handling Inappropriate Customers
Escalating Branch Issues
Chapter Review