

Advancing Customer Connections

Strengthen conversations to support customer retention while sustaining profitability



SELF-PACED
E-LEARNING

1-2
HOURS



SKILLS
APPLICATION
LAB

1
DAY

OVERVIEW

This program, which includes a self-study e-learning course and an immersive Skills Application Lab (SAL), gives participants the skills to expand customer relationships and proactively address customers' financial needs. The e-learning course builds foundational knowledge that is necessary for participation in the SAL. During the SAL, participants practice a proven method for deepening customer connections and proposing solutions to meet current and future customer needs.

WHO SHOULD ATTEND

This course is for sales and service associates and their managers. In order to take the SAL, participants must pass the e-learning course with an assessment score of at least 80%.

RESULTS AND BUSINESS BENEFITS

Upon completion, participants will be able to:

- Expand customer relationships, providing a competitive advantage
- Demonstrate the behaviors that deepen connections with existing customers
- Implement planning tools to prepare for follow-up customer calls and meetings
- Apply Omega Performance's *Handling Objections* model when faced with customer resistance to a follow-up meeting
- Develop an action plan for on-the-job skill application and growth

LEARNING TOPICS

1

Deepening
Customer
Connections

2

Follow-up
Calling

3

Follow-up
Meeting
Preparation



BLENDED LEARNING BY OMEGA PERFORMANCE

The Omega Performance blended learning experience helps participants learn critical skills, deepen comprehension, and improve on-the-job skill application and sustainment. Self-paced E-Learning courses present learning objectives and enhance understanding in a highly-interactive online environment, while in-person, instructor-led Skills Application Labs (SALs) provide participants with the opportunity to collaboratively apply skills to real-world cases.

MOODY'S
ANALYTICS

Omega
performance

LEARNING SOLUTIONS

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