

Building Customer Connections

Drive targeted conversations that align customers' needs with appropriate products



SELF-PACED
E-LEARNING

2-3
HOURS



SKILLS
APPLICATION
LAB

2
DAY

OVERVIEW

This program, which includes a self-study e-learning course and an immersive Skills Application Lab (SAL), equips participants to interact with customers in a way that addresses their financial needs, strengthens relationships, and improves customer satisfaction while increasing sales. The e-learning course builds foundational knowledge that is necessary for participation in the SAL. During the SAL, participants prepare for and practice customer conversations in small groups, and receive comprehensive feedback on what they do well and where there are opportunities for improvement.

WHO SHOULD ATTEND

Anyone who interacts with clients, including personal bankers, branch managers, sales and service associates, and universal tellers. 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:

- Engage in customer interactions that differentiate an organization in the marketplace
- Increase customer satisfaction, retention, and loyalty
- Improve sales and lending results at the individual and team levels
- Increase products per customer/business, cross-sell ratios, and sales growth

LEARNING TOPICS

1

Connecting
with the
Customer

2

Gathering the
Right
Information

3

Handling
Objections

4

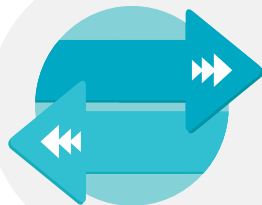
Matching
Customer Needs
to Products and
Benefits

5

Explaining
Solutions

6

Completing
the Sale



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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