

The Goal:

Increase customer satisfaction of loan application process by 10% by end of 2025.

On the Job Tasks (Broken down by steps):

Build rapport

Engage in company specific welcome model

Introduce self

Offer beverage

Ask about day

Practice opportunities in training that mimics tasks on the job:

Activity: Branching scenario to practice steps

Knowledge and content to teach before learners can practice:

Content: Overview of model

Recommend products/services based on member need.

Identify motivation for customer's loan request

Know relevant products

Auto-loans have the most situation-based products

Activity: identify recommendations with branching scenario

Content: Overview of products

Engage in open-ended questions

Activity: Branching Scenario with customer

Activity: Open-ended questions & empathetic statement examples

Utilize empathetic statements

Write intake note summary

Add info: name, job, company, tenure, membership, salary

Include member's initial ask and motivation.

Include products and services recommended

Activity: Find the missing parts of a note
Activity: Put a note together

Content: Note sections breakdown and examples