

Quality Customer Service and Cross-Selling for Results

Course Description

This course will enable participants to provide world-class customer service and cross-sell with confidence. Participants will receive instruction, supplemented by examples and case studies, on telephone techniques, active listening, handling upset customers, expediting calls, managing multiple priorities and professional communications. Participants will also be instructed in successful methods and techniques for cross-selling: identifying and satisfying customer needs, selling with confidence, overcoming customer objections and closing the sale. In-class exercises and role-playing will provide hands-on application of subject matter, with direction and feedback for improvement from the instructor.

Duration 7 hours, 1 day

Content

- Effective Communication Skills
- Providing Exceptional Customer Service
- Meeting the Customers' Needs
- Telephone Skills and Techniques
- Up-Selling and Cross-Selling Techniques
- Managing Stress in Customer Service and Sales
- Taking Responsibility
- Selling – Qualifying and Overcoming Objections
- Closing the Sale
- Handling Multiple Priorities
- Satisfying the Angry Customer
- Multi-tasking

Learning Outcomes

After completing this class participants will:

- Identify ways to improve customer service.
- Understand the importance of good telephone communication skills.
- Learn methods for increasing sales through cross-selling and up-selling.
- Develop an action plan for implementing concepts learned in the program.
- Successfully complete the post-test.

Methodology

- Facilitator led discussion
- PowerPoint slides and video
- Small group exercises and discussion

Materials

- Each participant will receive a comprehensive workbook with all materials presented and discussed in the course.

Pre-Requisites

- High School Graduate or GED. Math and English at the 12th Grade level
- One Year of Work Experience in the Financial Services Industry recommended

Assessment (pre and post)

- At the beginning of the first session, participants will be given a pre-test to determine their subject knowledge.
- At the completion of the program, participants will be given a post-test to determine the level of comprehension of the program.

