



JEFF HAVENS

FINANCIAL SERVICES BUSINESS SKILLS

VIDEO SERIES QUIZ

QUIZ TIME!

CROSS SELLING EPISODE 1

In this video, we discuss cross-selling best practices, as well as a few not-so-best practices. Since cross-selling has recently come under fire for the way that some financial institutions have gone about it, we think this is probably a good video to watch if you don't want to receive a huge fine. Also, there's kale in this video. Everybody wins!

1) What is cross selling?

- a. The same as crossbow selling.
- b. The process of signing clients up for multiple services offered through your bank.
- c. Something illegal that you should not do.

2) Which of the following is an effective cross-selling technique?

- a. Signing your clients up for other products without their knowledge.
- b. Listening to their needs and suggesting additional products they might enjoy.
- c. Focusing on the dangers of not listening to your advice.

3) How do the video's creators feel about kale?

- a. Scrumptious and nutritious.
- b. Great on burgers!
- c. A crime against humanity.

INTERNAL COMMUNICATIONS

EPISODE 2

In this video we discuss various methods of internal office communication – phone, email, and in-person – and analyze best practices for each. We've also hidden a refrigerator in an unexpected location. See if you can find it! But probably focus more on the 'how to communicate effectively' part of things.

1) What are the elements of a good phone message?

- a. Leaving your name and callback number.
- b. Leaving your name, callback number, and a detailed explanation of why you're calling and what you need.
- c. Leaving a fake name, a wrong callback number, and a snappy one-liner that will leave them confused and curious for the rest of the day.

2) According to the video, when should you choose in-person communication over phone or email?

- a. When you're lonely and want company.
- b. When you work close to them and can easily stop by their office.
- c. When the issue is so important or sensitive that you need an immediate answer.

3) When leaving a message, what should be your goal?

- a. To get the people to respond asking for clarification or further details.
- b. To leave enough information that the other person need respond only once.
- c. To be as brief as possible to avoid wasting their time.

EXTERNAL COMMUNICATION

EPISODE 3

In this video we discuss ways of talking good and stuff – specifically, how to conduct meetings and make sure your other communications are valuable to both you and your communication partner. We'll focus on the importance of having a clear agenda for your conversations, along with the different benefits of phone, text, and email communications. There shall also be mention of a tasty dessert, so this video is not only educational but delicious as well!

1) When communicating with others, what should you always have in mind?

- a. An agenda of what you want to cover during the conversation.
- b. A clever introduction.
- c. A pony or possibly a full-grown horse.

2) When conducting group meetings, when should you discuss your most important items?

- a. At the beginning.
- b. In the middle.
- c. At the end.

3) What advantage does communication by phone have over communication by text or email?

- a. It will let you hear the sweet, sweet sound of the other person's goice.
- b. It is the best way to get someone's undivided attention (short of a face-to-face meeting).
- c. There is no advantage. Do people still use phones?

WHEN THINGS GO WRONG

EPISODE 4

In this video we discuss how to handle problems, mistakes, upset customers, and anything else that goes wrong. Making sure customers feel heard and are certain their concerns will be addressed promptly is a great way to end a problem before it can really begin – but of course we'll also show you a few ways to screw this all up. You can learn just as much by watching what not to do, and we've done a really good job of demonstrating that. Hope you enjoy!

1) What is the most important thing to do when your customer has a problem?

- a. Solve it immediately.
- b. Acknowledge that their problem is valid and needs to be addressed.
- c. Ignore it until it goes away.

2) If a customer is angry because a mistake has occurred, which of the following is the best way to address the issue?

- a. Direct the customer to someone who can fix the issue.
- b. Respond to any anger on their end with even more anger on your end – that'll teach 'em to yell at you!
- c. Refuse to deal with them until they are more polite.

3) Which of the following is not likely to be an issue your customers will face?

- a. Meteor strikes.
- b. Incorrect charges or withdrawals.
- c. Problems with hold limits.

CUSTOMER SERVICE BASICS

EPISODE 5

In this video we discuss how to treat those pesky bloodsuckers known as customers. (The first thing we talk about is the importance of not thinking of them as (pesky bloodsuckers.) We discuss some really intricate strategies like smiling, being nice, listening well, and other esoteric skills. We also slowly drive one of our actors insane. You'll enjoy seeing how!

1) How should you address all of your customers, both internal and external?

- a. Gruffly, and with evident impatience
- b. With a smile, even if they're on the phone and they can't see it.
- c. By crying. A lot.

2) According to the video, how might a customer interpret the phrase 'he went home early?'

- a. He's sick and so now you probably are, too.
- b. Our company has a great flexible working environment.
- c. He doesn't work very hard or care much about your issues.

3) What's the most important thing for you to let your customers know?

- a. That you're putting their needs first.
- b. That your company's automated menu items have recently changed.
- c. That you only have good people for customers.

PROFESSIONALISM

EPISODE 6

In this video we cover various right (and not-so-right) ways to conduct yourself with the kind of professionalism your colleagues and customers will expect. We encourage you to dress well, make it difficult for people to steal from you, engage in human interactions from time to time, and be very careful about what you do when you go to Vegas. We cover a lot, as you can see. Take notes! (Just kidding, just watch it.)

1) Which of the following behaviors did this video not cover?

- a. Proper dress
- b. Appropriate and inappropriate conversations
- c. Leaving the teller window unoccupied.
- d. Effective dancing techniques.

2) Why is it important to pay attention to the kinds of conversations you have?

- a. People might get the wrong impression of you and your business if they overhear something personal.
- b. Non-financial topics should never be discussed in a bank.
- c. People might be recording your conversations to use against you later in an elaborate blackmailing scheme.

3) Which of the following best summarizes the overall point of this video?

- a. Don't eat at your desk.
- b. Pay attention to the way your dress, actions, and behavior reflect on you and your institution.
- c. Using big words can frustrate some people.

COUNTING MONEY

EPISODE 7

In this video we discuss the proper way to count money. The video assumes that you are capable of counting, so if that's not the case then you'll need to go find another video. But we believe in you, and we also believe you'll find our video on this not-so-exciting subject more amazing than you thought possible. Have fun!

1) How many times should you count money when you're giving it to customer?

- a. Once
- b. Twice
- c. Thrice (fancy word for three times!)

2) Why is it important to count money out loud in front of the customer?

- a. To make them feel rich.
- b. To assure them that the amount is correct.
- c. Because we told you to.

ANSWERS

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- 2) Which of the following is an effective cross-selling technique?
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- 3) How do the video's creators feel about kale?
 - c. A crime against humanity.

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why you're calling and what you need.

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a. Direct the customer to someone who can fix the issue.

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b. With a smile, even if they're on the phone and they can't see it.

2) According to the video, how might a customer interpret the phrase 'he went home early'?

c. He doesn't work very hard or care much about your issues.

3) What's the most important thing for you to let your customers know?

a. That you're putting their needs first.

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d. Effective dancing techniques.

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