



INDIAN INSTITUTE OF BANKING & FINANCE

(ISO 9001:2015 Certified)

Programme on

“Customer Relations & Service Excellence”

In VIRTUAL (Online) MODE

27th to 28th February 2024



LIVE CLASSROOM SESSIONS

“Individuals can also register for the programme at their own cost”

Programme Co-Ordinator: Dr Thiruma Valavan A

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INDIAN INSTITUTE OF BANKING & FINANCE

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Virtual (Online) Programme on “Customer Relations & Service Excellence”

BACKGROUND

During its 95 years of service, IIBF which is an "Institute of the Bankers, for the Bankers and by the Bankers" has emerged as a premier institute in banking and finance education. Considering the emerging requirements of the bankers in the ever changing dynamic environment, IIBF has been providing training to bankers in select areas. IIBF has world class training facilities at its Leadership Center at Mumbai. It also has four Professional Development Centres (PDCs) at Delhi, Chennai, Mumbai & Kolkata with residential facilities at Delhi to accommodate more than 50 participants at a time.

PURPOSE

The Programme on “Customer Relations & Service Excellence” has been designed considering the bankers’ needs in this area. Acquiring new customers and customer care are essential part of commercial banking. Best customer service leading to customer delight & moving towards Customer Excellence, is the key to success in business expansion in the current environment. The art of bringing in new customers, involves the art of brand building; best customer service decides the edge over the other players in this competitive era. Considering the paradigm shift in the approach to new business and customer service, a two days programme on the subject is designed by the Institute targeting the officials working in the branches including the front line staff in commercial banks, co-operative Banks, RRBs and SFBs. The programme envisages sharpening the skills for better leads conversion and customer care. It covers different key areas like communication skills, business etiquettes, selling of different Banking products, governing regulatory guidelines, etc. This is a trainee oriented virtual programme with more emphasis on presentations, interactions, case studies and sharing of experiences facilitated by experienced faculty Members from the Banking Industry.

OBJECTIVES

- To understand the relevance of Customer Relations & Service Excellence
- To improve the knowledge and skills in bringing in new customers with emphasis on relevant topics like segmentation, positioning, business etiquettes, moments of truth, push and pull style.
- To understand the regulatory guide lines and features in specific sectors in Credit like retail banking / SME financing products and Third party products
- To understand the need to focus Customer centric Model
- To improve the skills required in the day-to-day of Banking with special emphasis on the Customer Relations & Service Excellence

CONTENT OVERVIEW

- Changing Banking Scenario - Managing the Change and accepting the challenges in Customer Relations & Service Excellence
- Understanding the significance of customer relations
- Exploring the impact of positive and negative customer experiences
- Introduction to the customer journey and touchpoints
- Effective communication skills for customer interactions
- Building trust and credibility with customers
- Handling customer complaints and turning them into opportunities
- Techniques for understanding and identifying customer needs
- Customizing products/services to meet customer expectations
- Using customer feedback for continuous improvement
- Developing a customer-focused mindset within the organization
- Aligning internal processes with customer needs
- Employee training and development for customer-centricity
- Strategies for exceeding customer expectations
- Implementing proactive customer service
- Leveraging technology for improved customer experiences
- Key performance indicators (KPIs) for customer satisfaction
- Customer satisfaction surveys and feedback mechanisms
- Analyzing data to enhance customer experiences
- Dealing with difficult customers and challenging situations
- Conflict resolution techniques for positive outcomes
- Maintaining professionalism under pressure
- Creating loyalty programs and incentives
- Personalizing customer interactions for enhanced loyalty
- Case studies on successful customer loyalty initiatives
- Exploring the impact of technology on customer relations
- Social media and its role in customer engagement
- Adapting to changing customer expectations
- Establishing a culture of continuous improvement
- Adapting strategies based on evolving customer trends
- Staying competitive in the market through customer-centric approaches
- Developing a personal action plan for implementing customer excellence strategies
- Resources and tools for ongoing learning and development.

METHODOLOGY

Virtual (Online) interactive lectures, Case Studies, presentations and sharing of experiences on Institute's LMS (Based on Zoom)

Live sessions by Faculty shall be conducted and participants can attend the sessions from home or office using Laptop/Desktop.

Login details for accessing the sessions shall be shared on registered mail ids of participants 24/48 hours before the program.

TARGET GROUP

Officers from Scale-1 & up to Scale IV or equivalent in Banks/ FIs currently posted or proposed to be posted in Branches, Branch Managers & Trainers can also attend this programme.

DURATION

2 Days. From 27th to 28th February 2024.

Timings 10.00 a.m. to 5.15 p.m.

FEE

Rs. 4,000/- per participant plus GST @18% aggregating to Rs.4,720/- (Rs. Four thousand seven hundred twenty only). (In case of TDS deduction, please send us TDS certificate).

Programme fees may be remitted to the credit of Institute's account as given below :

- ❑ Beneficiary Name - Indian Institute of Banking and Finance
 - ❑ Name of the Bank branch: State Bank of India, Vidya Vihar (West), Mumbai.
 - ❑ Savings Account No: 36919200263 IFSC code: SBIN0011710
 - ❑ (PAN No: AAATT3309D and GSTIN NO. 27AAATT3309D1ZS)
- (Kindly provide your GST Number in the nomination letter to facilitate raising of invoice)

For further details and nomination, kindly contact:

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| Dr. Thiruma Valavan, Programme Coordinator, Deputy Director, Mobile : 95858 83789 Email: dd.trg2@iibf.org.in | Mr. P N Mehrotra, Director (Training), Phone : +91-22-68507004, Mobile : 82912 94676 Email: dir.trg@iibf.org.in |
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NOMINATION FORM FOR BANKS/ FIs

Programme title: **“Customer Relations & Service Excellence”**

Date: **27th to 28th February 2024 (Tuesday-Wednesday)**

Type: **Virtual (Online)** mode

PARTICIPANTS NOMINATED:

| Sl. No | Name (Mr/Mrs/Ms) | Designation | Branch/Office | Contact No. (Mobile No & Landline No.) | E-mail (PERSONAL AND OFFICIAL MAIL ID BOTH)* |
|--------|------------------|-------------|---------------|--|--|
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |

***LOGIN DETAILS OF THE PROGRAM SHALL BE SHARED ON PERSONAL MAIL ID.**

Name of Bank/ FI: _____

Address: _____

GST Details of Nominating Bank: _____

Phone No. of **Nominating** Official: -----E-Mail of **Nominating** Official: _____

Fee: Rs. 4,000/- per participant plus GST @18% aggregating to Rs. 4,720/- (Rs. Four thousand seven hundred twenty only). (In case of TDS deduction, please send us TDS certificate).

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(Please provide your GSTN in the nomination letter)

Please send your nominations at the earliest to:

Dr.Thiruma Valavan A,
Programme Coordinator & Deputy Director
Mobile: 95858 83789
Email: dd.trg2@iibf.org.in



INDIAN INSTITUTE OF BANKING & FINANCE
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FORM FOR SELF-SPONSORED CANDIDATES

Programme title: **“Customer Relations & Service Excellence”**

Date: **27th to 28th February 2024 (Tuesday-Wednesday)**

Programme Type: **Virtual (Online)** mode

Details of nomination:

| Sl. No | Name (Mr/Mrs/Ms) | Designation | Contact No. (Mobile) | E-mail (PERSONAL) | UTR NUMBER |
|--------|------------------|-------------|----------------------|-------------------|------------|
| 1 | | | | | |

Name of Bank/ FI employed with (if any): _____

Address of The Nominee: _____

Fee: Rs. 4,000/- per participant plus GST @18% aggregating to Rs. 4,720/- (Rs. Four thousand seven hundred twenty only). (In case of TDS deduction, please send us TDS certificate).

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- ✓ Beneficiary Name: Indian Institute of Banking and Finance
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