



# INDIAN INSTITUTE OF BANKING & FINANCE

(ISO 21001:2018 Certified)

Program on

## “Customer Service Excellence”

In PHYSICAL (Offline) MODE

(This is a non-residential Programme)

**16<sup>th</sup> to 17<sup>th</sup> (Wed. & Thu.) October, 2024**



### INTERACTIVE PHYSICAL SESSIONS

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

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# INDIAN INSTITUTE OF BANKING & FINANCE

(ISO 21001:2018 Certified)

## Physical (Offline) Program on “Customer Service Excellence”

### BACKGROUND

During its 96 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 Centre, Mumbai. It also has four Professional Development Centres (PDCs) at Delhi, Chennai, Kolkata & Mumbai.

### PURPOSE

The Programme on “Customer 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. Recommendations of B P Kanungo Committee Report on the Review of Customer Service Standards in the RBI Regulated Entities and EASE 7.0 - Maintaining a Strong Customer Orientation prompted the architecture of this programme. 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 physical programme with more emphasis on presentations, Experiential Learning, Group interactions, case studies and sharing of experiences facilitated by experienced faculty Members from the Banking Industry.

### OBJECTIVES

- To understand the relevance of Customer 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 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 using Transactional Analysis Techniques (TA)
- Interpersonal Skills to connect with your customers using TA
- Conflict Resolution Skills and enhancing responsiveness using TA
- Building trust and credibility with customers using TA
- Understanding the Role of Emotional Intelligence (EI) in Customer Service - Listening to Customers
- Handling customer complaints and turning them into opportunities
- Techniques for understanding and identifying customer needs
- Service Quality - SERVQUAL Model (Identifying the 5 Gaps in Customer Service) - Moment of Truth.
- BaaS - Banking as a Service Model
- Customizing products/services to meet customer expectations
- Leveraging technology for improved customer experiences
- Dealing with difficult customers and challenging situations
- Creating loyalty programs and incentives
- Social media and its role in customer engagement
- Banking Ombudsman and Internal Ombudsman for Resolution of Complaints
- EASE 7.0 - From Customer Care to Customer Delight

## METHODOLOGY

Interactive lectures, Experiential Learning, Icebreakers, Case Studies, Video based discussions, presentations and sharing of experiences.

## 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, 16<sup>th</sup> to 17<sup>th</sup> (Wed. - Thu.) October, 2024. This is a Non-Residential Programme.

## FEE

Rs.6,000/- + GST per participant plus GST @18% aggregating to Rs.7080/- (In case of TDS deduction, please send us TDS certificate).

Program 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:**

Dr. Sandeep Hegde, Faculty - Training Phone : +91-22-68507010, Mobile: 9870194712 Email: fm.trg1@iibf.org.in	Mr. L V R Prasad, Director (Training), Phone : +91-22-68507004, Mobile: 9650433118 Email: dir.trg@iibf.org.in
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**INDIAN INSTITUTE OF BANKING & FINANCE**  
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**NOMINATION FORM FOR BANKS/ FIs**

Program title: Customer Service Excellence (Physical Mode)

Date: 16<sup>th</sup> to 17<sup>th</sup> (Wed.- Thu.) October, 2024

**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					

**Note: This is a Non-Residential Programme**

Name of Bank/ FI: \_\_\_\_\_

Address: \_\_\_\_\_

**GST Details** of Nominating Bank: \_\_\_\_\_

Phone of **Nominating** Official:----- E-Mail of **Nominating** Official: \_\_\_\_\_

**Fee:** Rs.6,000/- + GST per participant plus GST @18% aggregating to Rs.7080/ (In case of TDS deduction, please send us TDS certificate).

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  - (PAN No: AAATT3309D and GSTIN NO. 27AAATT3309D1ZS)(Please provide your GSTN in the nomination letter)

**Please send your nominations at the earliest to:**

**Dr. Sandeep Hegde,**  
**Faculty - Training**  
**Phone : +91-22-68507010,**  
**Mobile: 9870194712**  
**Email: fm.trg1@iibf.org.in**



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

Program title: Customer Service Excellence  
Date: 16<sup>th</sup> to 17<sup>th</sup> (Wed. – Thu.) October, 2024  
Program Type: **Physical (Offline)** mode

**Details of nomination:**

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

**Note: This is a Non-Residential Programme**

Name of Bank/ FI employed with: \_\_\_\_\_

Address of the candidate: \_\_\_\_\_

**Fee:** Rs.6000/- + GST per participant plus GST @18% aggregating to Rs.7080/ (Please furnish the details of payment (UTR Number) in the last column)

Program 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.
- ✓ SB Account No: 36919200263 IFSC code: SBIN0011710
  - (PAN No: AAATT3309D and GSTIN NO. 27AAATT3309D1ZS)(Please provide your GSTN in the nomination letter)

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