

CASE STUDY 10

Introducing a WAL Customer Relations Programme in an International Bank

PROGRAMME BACKGROUND

The management of an international bank was concerned that there was an increase in apathy towards its customers by the staff in many of its branches. This was confirmed by numerous letters of complaint from customers. One of the other concerns of management was that although frontline staff and bank officers were technically competent in banking, many lacked customer relations skills. The management believed that a Customer Relations Programme needed to be planned and implemented for the bank officers and front-line staff of all its branches.

As a first step, the management decided that 60 bank officers and 200 front-line staff, chosen from across all the branches, should be exposed to the concepts and practice of effective customer relations. They suggested that the programme for the officers and front-line staff be run separately and be integrated into their workplace.

This Work-Applied Customer Relations Programme had two Action Research (AR) cycles, comprising AR Group meetings, Knowledge Workshops, observations and reflections, evaluation and validation.

CYCLE 1

First AR Group Meeting

The AR Group for this program was made up of the Training Manager of the bank and two external Facilitative Consultants. The first AR Group meeting established the objectives of the program, the programme design and the terms of the working relationship between the Facilitative Consultants and the Training Manager. It was decided that a select group of bank officers would be part of the AR Group as the programme progressed.

The objectives of this programme as agreed by the AR Group were to:

- Provide the bank officers with an understanding of the concepts and practice of customer relations and how this could be used to develop a closer working relationship with their front-line staff and bank customers;
- Facilitate the bank officers to work in teams to develop a customer relations guide for the front-line staff;
- Coach and mentor the Training Manager to develop facilitation skills and undertake facilitation;
- Validate the customer relations guide with the front-line staff during their two-day workshops; and
- Develop and launch a customer relations campaign to further emphasise the importance of customer relations in all the branches.

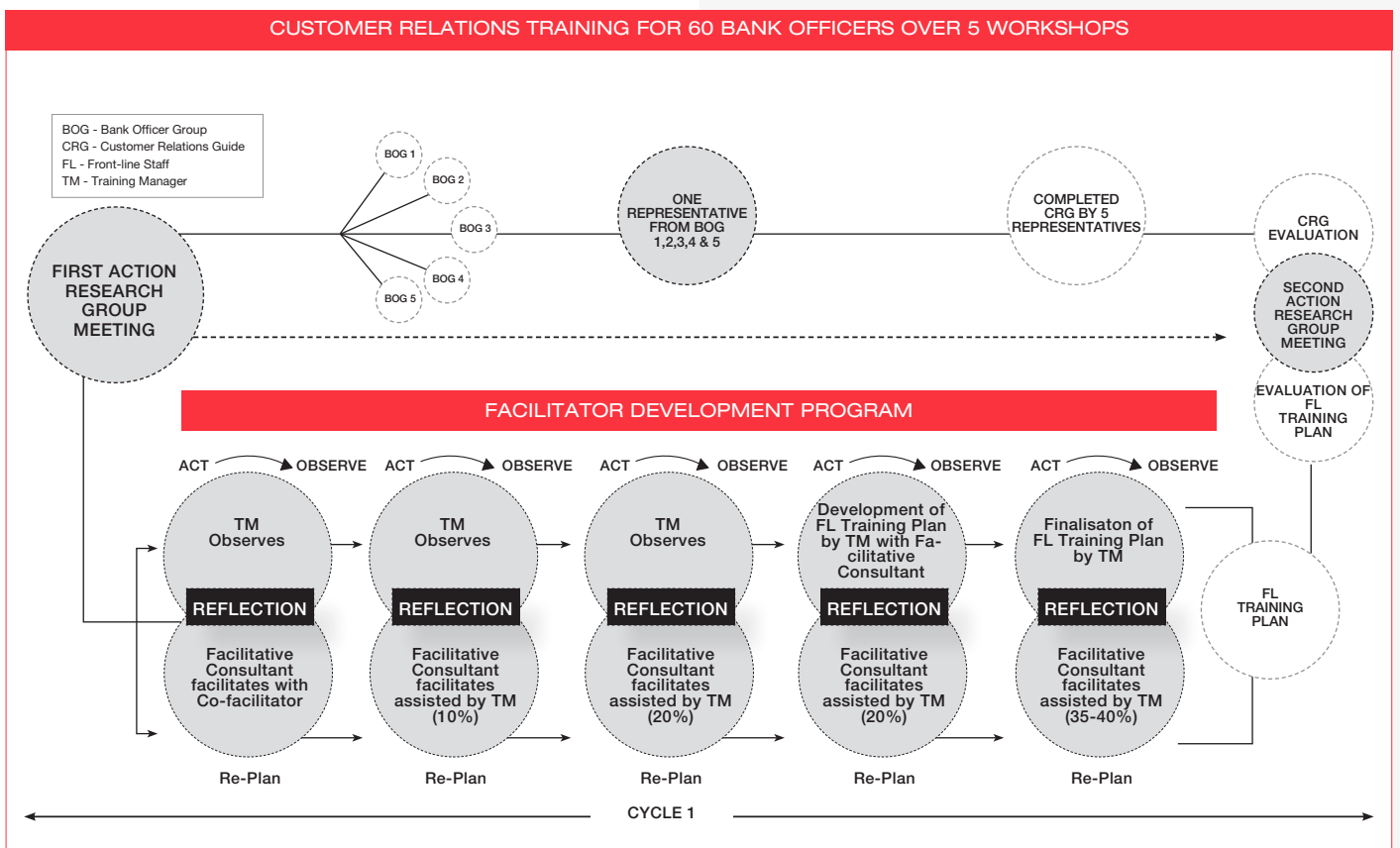
The design of the Customer Relations Programme had three components:

1. Customer Relations Training for the 60 bank officers. These bank officers were divided into five groups of twelve each, named BOG 1 to 5. Each group attended a four-day Bank Officers (BO) Knowledge Workshop on Customer Relations.
2. Facilitator Development for the Training Manager. The Training Manager was provided coaching and mentoring in facilitation skills in order to facilitate workshops for the front-line staff.

3. Customer Relations Training for the 200 front-line staff. The staff were divided into ten groups of twenty each, called FLG 1 to 10. Each group attended a two-day Front-line (FL) Knowledge Workshop on Customer Relations Skills development.

The BO Knowledge Workshops and the Facilitator Development process for the Training Manager occurred simultaneously in Cycle 1 as shown in Figure 5.

Figure 5: BO Knowledge Workshops and the Facilitator Development process



Customer Relations Training for Bank Officers

The 60 bank officers were divided into five groups of twelve each. Each group attended a four-day Bank Officers (BO) Knowledge Workshop on customer relations.

During the BO Knowledge Workshop for BOG 1, the twelve bank officers acquired knowledge in Customer Relations to improve their own effectiveness. Then, as a team, they used the newly learnt concepts to undertake a work-based project, namely, to develop a draft Customer Relations Guide for the front-line staff who deal with customers.

The 12 bank officers worked as two teams of six to apply the concept of customer relations both for their own individual effectiveness and in the development of the draft Customer Relations Guide. There was a need for two Facilitative Consultants on the programme because separate coaching was necessary for the two teams as they completed their draft Customer Relations Guide.

Both teams then shared their drafts with each other in a reflective session. They then reviewed the commonalities and differences and developed what they believed would be an ideal Customer Relations Guide. This process was duplicated at the BO Knowledge Workshops for the other four groups, namely BOG 2 to BOG 5, with each group developing a draft Customer Relations Guide for the front-line staff.

Each of the five groups then nominated one member to form a learning team of five officers (Learning Team). This Learning Team reviewed and reflected on the five draft guides completed by the groups and developed a final draft of what they believed would be an ideal Customer Relations Guide for the frontline staff.

Facilitator Development for the Training Manager

Simultaneously with the BO Knowledge Workshops, the Training Manager went through a Facilitator Development process whereby she developed her facilitation skills as follows:

- By observing and reflecting with the Facilitative Consultants on the first Knowledge Workshop;
- By being incrementally involved as a co-facilitator at the remaining BO Knowledge Workshops ; and
- By presenting to the Facilitative Consultants, for their feedback, the proposed session plan and all the required material for the FL Knowledge Workshops.

Subsequently, the Facilitative Consultants provided coaching and mentoring to the Training Manager throughout the delivery of the FL Knowledge Workshops.

This Facilitator Development process for the Training Manager provided an ongoing benefit for the bank since the Training Manager could then train new bank officers and other front-line staff as well as deliver other Work-Based Learning workshops. By developing the skills of the Training Manager, the bank was investing in its own future.

Second AR Group Meeting

From this meeting onwards, the Learning Team became members of the AR Group. At this meeting, the AR Group:

- Reviewed and reflected on the final draft of the Customer Relations Guide which was to be discussed by the front-line staff during the FL Knowledge Workshops;
- Evaluated the session plan and materials developed by the Training Manager for the FL Knowledge Workshops; and
- Reviewed and commented on the Customer Relations campaign for the branches which had been developed by the Training Manager.

CYCLE 2

Customer Relations Training for Front-Line Staff

The 200 front-line staff were divided into ten groups of twenty, namely FLG1 to FLG 10. Each group attended a two-day Knowledge Workshop on customer relations. These ten workshops were facilitated by the Training Manager over a period of five months.

During these workshops, the views of the 200 front-line staff were sought on the final draft Customer Relations Guide, since they were to use the final version as their guide in the workplace. Evaluation of these workshops was undertaken after every workshop and improvements were made to subsequent workshops based on the feedback obtained.

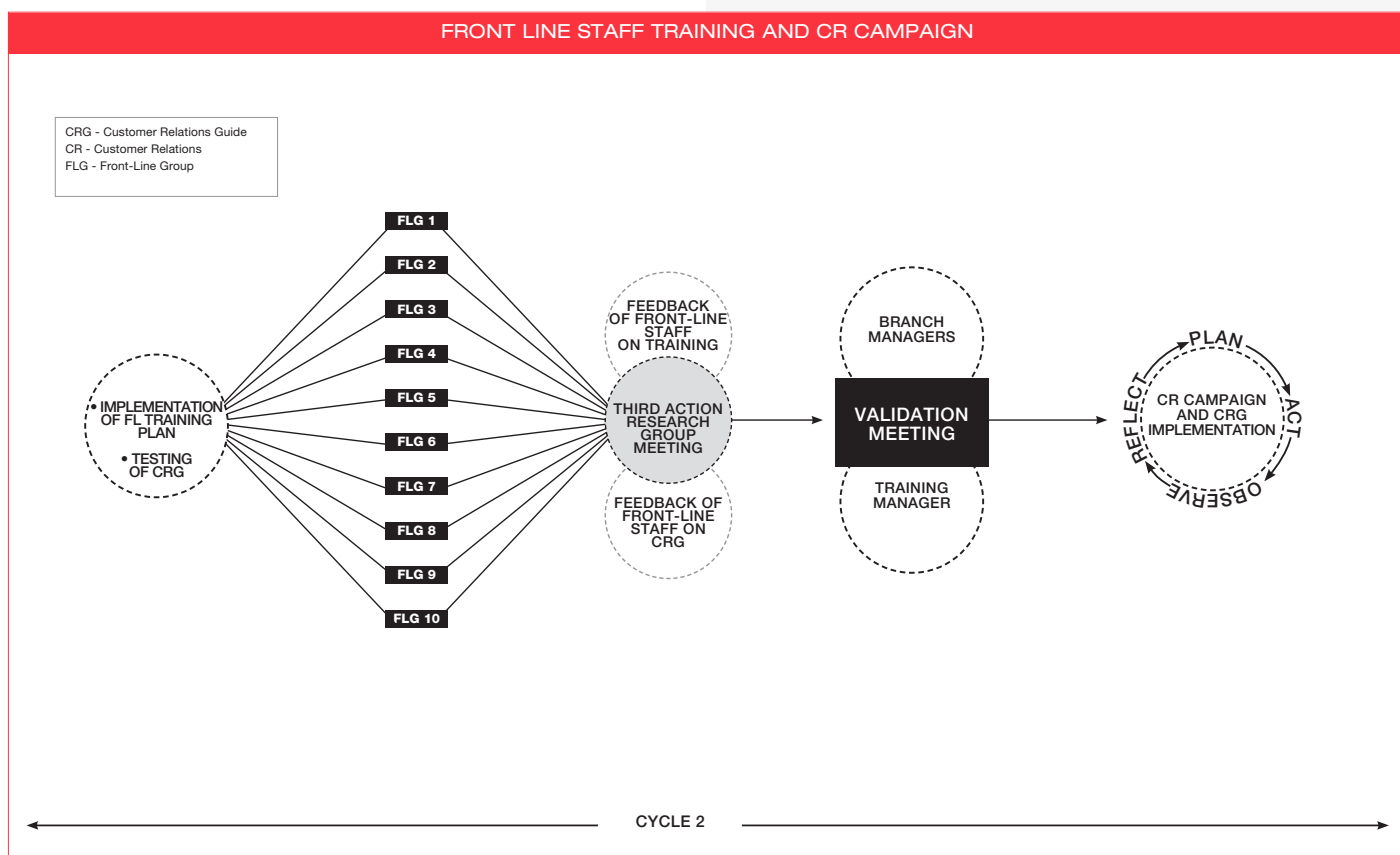
Third AR Group Meeting

At the third AR Group meeting, the members reviewed and analysed the views of the 200 front-line staff on the draft Customer Relations Guide and incorporated these views into the final version of the guide.

They also reviewed the feedback about the workshops and summarised the improvements to be undertaken for future delivery of similar workshops.

The Customer Relations campaign was also finalised for the review of management. Figure 6 shows the details of the front-line staff training and the customer relations campaign.

Figure 6



Abraham, S. (2012, 2015)

Validation

The Training Manager met with a Validation Committee comprising select branch managers and presented feedback from the following activities for its review and comment:

- The BO Knowledge Workshops
- The Training Manager's Facilitator Development process; and
- The FL Knowledge Workshops

The Training Manager also presented the Customer Relations campaign to the Validation Committee. After incorporation of the views and suggestions of the Validation Committee, the Customer Relations campaign was launched by the Training Manager at the bank branches.

The Validation Committee proposed that at each branch, select bank officers and front-line staff should work as learning teams to monitor and evaluate the performance indicators of project outcomes, learning outcomes and process outcomes. Another proposal was that each branch should, through a newsletter, share with the other branches lessons learnt from the Customer Relations Programme.

FOR FURTHER INFORMATION ON OUR PROGRAMME, PLEASE CONTACT US: