

### Training Solutions Curriculum Overviews



In the **Performance Management Workshop**, we begin by building an understanding of the value of disciplined management and coaching activities. The workshop experience develops the ability of managers to communicate effectively with their employees, to observe and accurately assess employee performance, engage in constructive balanced feedback, build meaningful action plans that create behavioral change, and hold them accountable for performance in a supportive yet firm manner. This workshop is applicable to managers in all business units across the enterprise.

Participants in the Performance Management Workshop will learn:

- Best practices to clarify the results, activities and behaviors that create performance excellence
- Creating effective team and individual goals
- Conducting high impact team meetings
- Evaluating quantitative and qualitative performance for strengths and improvement opportunities
- Creating and following up on individual action plans that drive results
- Maximizing individual performance through collaborative coaching

The Performance Management Workshop is traditionally presented in a series of four, full-day workshops including reinforcement activities over a 9 to 12-month period.

We offer tailored curriculum that targets specific strategic initiatives and organizational priorities; for example:

- Performance Coaching Workshop
- Action Planning Workshop

Every program can be customized to meet the needs of a client's budget, scope and timing.

In the **Relationship Management Workshop**, we build an understanding of the value of a disciplined approach to targeting, interacting with, and managing customer relationships over time. The focus of this workshop is on how to use the three-phase Relationship Management Process: Plan, Interview and Serve. The unique combination of activities, tools and behaviors place a high priority on developing effective solutions to maximize customer satisfaction and deepen relationships. The workshop is customized for Retail Bankers and Business Bankers.

Participants in the Relationship Management Workshop will learn:

- Effective prospecting and targeting of relationship opportunities
- Best practice planning and communication strategies for outbound calls to earn appointments
- Need-focused customer interviews, capturing critical customer data in an organized manner
- Routine follow up to expand customer relationships
- Proactive collaboration with business partners to create diversified customer relationships
- Managing time efficiently and effectively

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Raddon has been providing financial institutions with research-based solutions since 1983. Because we work exclusively with financial institutions, we understand the industry and can apply our practical know-how to the unique challenges and opportunities financial institutions face. We combine best practices in research and analysis with consulting and technology solutions to help institutions achieve sustainable growth and improve financial performance.

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In the **Referral Excellence Workshop**, we build an understanding of the value of listening carefully to the needs of customers and taking ownership for initiating a dialogue about the customer's desire to address those needs. The workshop experience then develops the ability of employees to demonstrate genuine interest in customers, inquire with sensitivity to the customer's privacy, explain benefits, confirm interest, and introduce the customer to the specialist who can provide the value-add solution. This workshop is customized for Tellers and Customer Care Center employees.

Participants in the Referral Excellence Workshop will learn:

- Best practices in the referral process
- Understanding types of financial needs
- Recognizing and responding to need cues
- Clarifying and confirm potential customer needs
- Collaborating with Business Partners for making customer-focused referrals
- Revisiting the customer and confirming satisfaction

The Referral Excellence Workshop is traditionally presented in a series of three, half-day workshops including reinforcement activities over a 3 to 6-month period. Every program can be customized to meet the needs of a client's budget, scope and timing.

In the **Service Excellence Workshop**, we build an understanding of the value of treating both internal and external clients with care and respect. The workshop experience then develops the ability of employees to communicate effectively, listen proactively, problem solve without placing blame, significantly impacting customer satisfaction.

Participants in the Service Excellence Workshop will learn:

- Best practices in the Service Process, for in-person and telephone contact
- How to handle interruptions in a professional manner
- How to handle difficult situations in a client-focused manner

- Solving problems in a proactive manner and without placing blame
- Best practices for specific defining moments, including:
  - Transferring a call
  - Placing a caller on hold
  - Taking a phone message
  - Leaving a voice mail
  - Sending and responding to email messages

The Service Excellence Workshop is traditionally presented in a series of three, half-day workshops including reinforcement activities over a 3 to 6-month period. Every program can be customized to meet the needs of a client's budget, scope and timing.

In the **Financial Product Knowledge Training**, we deliver efficient learning techniques based on repetition and timing. Participants will develop knowledge first, proficiency second and then the ability to converse easily, in a confident manner about the financial institution's products and services. Developing this kind of mastery frees the sales and service personnel to truly listen to what the customer is saying. There are three types of Product Drill Cards used as part of this program:

- Our Knowledge Drills build product and service mastery; a thorough knowledge of features and benefits;
- Our Speed Drills develop the quick recall necessary to speak about products and services fluently without hesitation
- Our Conversation Drills create the ability to talk with people about products and services in a natural tone and pace that promotes an easy, productive dialogue

The Financial Product Knowledge Training is traditionally presented in 1 or 2-day workshops including reinforcement activities over a 3-month period. Every program can be customized to meet the needs of a client's budget, scope and timing.

#### **Connect With Us**

For more information about Training and Development from Raddon, please contact us at 800-827-3500 or visit [www.raddon.com](http://www.raddon.com).