



CAREER CLUSTER
Finance

INSTRUCTIONAL AREA
Customer Relations

PRINCIPLES OF FINANCE EVENT

PARTICIPANT INSTRUCTIONS

PROCEDURES

1. The event will be presented to you through your reading of these instructions, including the performance indicators and interview task. You will have up to 10 minutes to review this information to determine how you will perform the task and demonstrate the performance indicators of this event. During the preparation period, you may make notes to use during the interview situation.
2. You will have up to 10 minutes with the judge, including 5 to 7 minutes to accomplish the task and several minutes to respond to follow-up questions. (You may have more than one judge.)
3. You will be evaluated on how well you meet the performance indicators of this event.
4. Turn in all your notes and event materials when you have completed the interview.

PERFORMANCE INDICATORS

1. Handle difficult customers.
2. Handle customer/client complaints.
3. Explain the nature of positive customer relations.
4. Demonstrate self control.



INTERVIEW SITUATION

You are to assume the role of candidate for a bank teller position at WATER STREET BANK, a local bank with six branch offices which offer checking, savings, certificates of deposit, mortgage products, personal loans and business banking products. You have submitted your résumé at one of the branch offices and have been invited in for a personal interview with the branch manager (judge). This interview will be used to measure your knowledge and understanding of an aspect of the banking business. The branch manager (judge) wants to make sure you understand the importance of positive customer relations before offering you the bank teller position.

On occasion at WATER STREET BANK, tellers must deal with customers who have complaints or are simply just difficult to deal with. In the first part of the interview you have been asked to explain the types of complaints a teller is likely to hear and guidelines to follow when dealing with difficult customers at the teller station. Your presentation must also include the additional performance indicators listed on the first page of this event. Following your explanation, the branch manager (judge) will ask you to respond to additional questions.

The interview will take place in the branch manager's (judge's) office. The branch manager (judge) will begin the interview by greeting you and asking to hear your ideas on dealing with difficult customers. After you have provided your explanation and have answered the branch manager's (judge's) questions, the branch manager (judge) will conclude the interview by thanking you for your presentation.

JUDGE'S INSTRUCTIONS

DIRECTIONS, PROCEDURES AND JUDGE'S ROLE

In preparation for this event, you should review the following information with your event manager and other judges:

1. Procedures
2. Performance Indicators
3. Event Situation
4. Judge Situation Characterization
Participants may conduct a slightly different type of meeting and/or discussion with you each time; however, it is important that the information you provide and the questions you ask be uniform for every participant.
5. Judge's Evaluation Instructions
6. Judge's Evaluation Form
Please use a critical and consistent eye in rating each participant.

JUDGE SITUATION CHARACTERIZATION

You are to assume the role of a branch manager of WATER STREET BANK, a locally based, full-service bank with six locations. The candidate (participant) is applying for a teller position in your branch. The candidate (participant) has submitted a résumé and has been invited in for a personal interview with you. This interview will be used to measure the candidate's (participant's) knowledge and understanding of an aspect of the banking business. You want to make sure the candidate (participant) understands the importance of positive customer relations before offering the bank teller position.

For the first part of the interview, the candidate (participant) has been asked to explain the types of complaints a teller is likely to hear and guidelines to follow when dealing with difficult customers at the teller station. The presentation must also include the additional performance indicators listed on the first page of this event. In the second part of the interview, the candidate (participant) will answer your questions.

The interview will take place in your office. You will begin the interview by greeting the candidate (participant) and asking to hear his/her ideas on dealing with difficult customers. After the candidate (participant) has presented the appropriate material, you are to ask the following questions of each candidate (participant):

1. If a customer comes to your station with his/her monthly statement and says, "My account doesn't balance." what would you do?
2. Aren't customer complaints simply inevitable?

Once the candidate (participant) has answered your questions, you will conclude the discussion by thanking the candidate (participant) for the work.

You are not to make any comments after the event is over except to thank the candidate.

Answers will vary but should demonstrate a basic understanding of the concepts.

JUDGE'S EVALUATION INSTRUCTIONS

Evaluation Form Information

The participants are to be evaluated on their ability to perform the specific performance indicators stated on the cover sheet of this event and restated on the Judge's Evaluation Form. Although you may see other performance indicators being demonstrated by the participants, those listed in the Performance Indicators section are the critical ones you are measuring for this particular event.

Evaluation Form Interpretation

The evaluation levels listed below and the evaluation rating procedures should be discussed thoroughly with your event chairperson and the other judges to ensure complete and common understanding for judging consistency.

Level of Evaluation	Interpretation Level
Exceeds Expectations	Participant demonstrated the performance indicator in an extremely professional manner; greatly exceeds business standards; would rank in the top 10% of business personnel performing this performance indicator.
Meets Expectations	Participant demonstrated the performance indicator in an acceptable and effective manner; meets at least minimal business standards; there would be no need for additional formalized training at this time; would rank in the 70-89 th percentile of business personnel performing this performance indicator.
Below Expectations	Participant demonstrated the performance indicator with limited effectiveness; performance generally fell below minimal business standards; additional training would be required to improve knowledge, attitude and/or skills; would rank in the 50-69 th percentile of business personnel performing this performance indicator.
Little/No Value	Participant demonstrated the performance indicator with little or no effectiveness; a great deal of formal training would be needed immediately; perhaps this person should seek other employment; would rank in the 0-49 th percentile of business personnel performing this performance indicator.

JUDGE'S EVALUATION FORM
PFN
SAMPLE EVENT

PERFORMANCE INDICATORS DID THE PARTICIPANT:	Exceeds Expectations	Meets Expectations	Below Expectations	Little/No Value	Judged Score
1. Handle difficult customers?	20, 19, 18, 17	16, 15, 14, 13, 12	11, 10, 9, 8, 7	6, 5, 4, 3, 2, 1	_____
2. Handle customer/client complaints?	20, 19, 18, 17	16, 15, 14, 13, 12	11, 10, 9, 8, 7	6, 5, 4, 3, 2, 1	_____
3. Explain the nature of positive customer relations?	20, 19, 18, 17	16, 15, 14, 13, 12	11, 10, 9, 8, 7	6, 5, 4, 3, 2, 1	_____
4. Demonstrate self control?	20, 19, 18, 17	16, 15, 14, 13, 12	11, 10, 9, 8, 7	6, 5, 4, 3, 2, 1	_____
5. Overall impression and responses to the judge's questions	20, 19, 18, 17	16, 15, 14, 13, 12	11, 10, 9, 8, 7	6, 5, 4, 3, 2, 1	_____
				TOTAL SCORE	_____