



**CAREER CLUSTER**  
Finance

**INSTRUCTIONAL AREA**  
Customer Relations

## **PRINCIPLES OF FINANCE EVENT**

### **PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Event Situation. You will have up to 10 minutes to review this information and prepare your presentation. You may make notes to use during your presentation.
- You will have up to 10 minutes to make your presentation to the judge (you may have more than one judge).
- You will be evaluated on how well you meet the performance indicators of this event.
- Turn in all of your notes and event materials when you have completed the event.

### **21<sup>st</sup> CENTURY SKILLS**

- Critical Thinking – Reason effectively and use systems thinking.
- Communication– Communicate clearly.
- Creativity and Innovation – Show evidence of creativity.

### **PERFORMANCE INDICATORS**

1. Explain the nature of positive customer relations.
2. Demonstrate a customer-service mindset.
3. Develop rapport with customers.
4. Determine ways of reinforcing the company's image through employee performance.

## **EVENT SITUATION**

You are to assume the role of a bank teller at THOMPSON BANK, a local bank that has two locations. A new coworker (judge) has asked you to explain how bank tellers can develop positive relationships with drive-through customers when interaction is so limited.

THOMPSON BANK employs three bank tellers that only handle customers using the drive-through. The bank's policy is that the drive-through can only be used for deposits, withdrawals or check cashing. Any further banking activities need to be done inside the bank. The drive-through has three lanes, each equipped with a camera and speaker system that allows the customer to see and hear the bank teller.

A new coworker (judge) has finished employee orientation and is now going through on-the-job training. Your new coworker (judge) has heard in orientation that THOMPSON BANK strives to always give "service with a smile." Your coworker (judge) has asked you how to demonstrate positive customer relations and develop relationships with customers when the interaction is so limited.

You will explain how to demonstrate positive customer relations to your new coworker (judge) in a role-play to take place at the bank. Your new coworker (judge) will begin the role-play by asking you about positive customer relations. After you have given your coworker (judge) an explanation and have answered your coworker's (judge's) questions, your coworker (judge) will conclude the role-play by thanking you for your work.

## 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. 21<sup>st</sup> Century Skills and 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 new bank teller at THOMPSON BANK, a local bank that has two locations. You have asked a veteran bank teller (participant) to explain how bank tellers can develop positive relationships with drive-through customers when interaction is so limited.

THOMPSON BANK employs three bank tellers that only handle customers using the drive-through. The bank's policy is that the drive-through can only be used for deposits, withdrawals or check cashing. Any further banking activities need to be done inside the bank. The drive-through has three lanes, each equipped with a camera and speaker system that allows the customer to see and hear the bank teller.

You have finished employee orientation and are now going through on-the-job training. You have heard in orientation that THOMPSON BANK strives to always give "service with a smile." You have asked the veteran bank teller (participant) how to demonstrate positive customer relations and develop relationships with customers when the interaction is so limited.

The bank teller (participant) will explain how to demonstrate positive customer relations to you in a role-play to take place at the bank. You will begin the role-play by asking about positive customer relations. During the course of the role-play you are to ask the following questions of each participant:

1. Do you think it's easier or harder for the bank tellers working with customers inside the bank to have positive customer relations?
2. Is it possible to have positive customer relations if we need to give a customer negative financial information regarding their account?

After the bank teller (participant) has given you an explanation and has answered your questions, you will conclude the role-play by thanking the bank teller (participant).

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

*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.

<b>Level of Evaluation</b>	<b>Interpretation Level</b>
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 <sup>th</sup> 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 <sup>th</sup> 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 <sup>th</sup> percentile of business personnel performing this performance indicator.



**PRINCIPLES OF FINANCE, 2017**

Participant: \_\_\_\_\_

**JUDGE'S EVALUATION FORM**  
DISTRICT EVENT

I.D. Number: \_\_\_\_\_

**INSTRUCTIONAL AREA**  
Customer Relations

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Explain the nature of positive customer relations?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
2.	Demonstrate a customer-service mindset?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
3.	Develop a rapport with customers?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
4.	Determine ways of reinforcing the company's image through employee performance?	0-1-2-3-4-5	6-7-8-9-10	11-12-13-14	15-16-17-18	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
5.	Reason effectively and use systems thinking?	0-1	2-3	4-5	6-7	
6.	Communicate clearly?	0-1	2-3	4-5	6-7	
7.	Show evidence of creativity?	0-1	2-3	4-5	6-7	
8.	Overall impression and responses to the judge's questions	0-1	2-3	4-5	6-7	
<b>TOTAL SCORE</b>						