

STAFF TRAINING AND DEVELOPMENT



Cross Financial training resources are industry specific and address the most common staff development objectives set by financial institutions. The training programs emphasize core competencies that help your employees meet performance expectations for effective customer service, relationship development, coaching and staff management.

MANAGEMENT AND COACHING SKILLS

To effectively empower your management team, your leaders need to create and live by a single, shared vision. We work with leadership to identify that vision and the impact it has on sales and service representatives. Then we'll help managers identify opportunities to coach their staff, improve communications across all departments, and develop a plan for enhanced time management. To help ensure lasting results, we also work with managers to implement measurement tools focused on: performance, accountability and motivation.

CUSTOMER SERVICE AND REFERRALS

Impactful customer service begins with a clear understanding of how everyday interactions impact relationship satisfaction and customer loyalty. We work with your team to develop skills for building rapport with customers and identifying their basic financial needs. Working together, your staff will enhance their customer service skills and develop natural, effective referral and suggestive selling skills.

SALES AND RELATIONSHIP DEVELOPMENT

Once your staff is comfortable engaging customers and identifying their basic financial needs, they can begin to expand relationships and enhance cross-selling opportunities. This training brings the customer relationship full circle, from identifying needs to selling products to sustaining long-term relationships. We will help your team balance their product knowledge with discovering needs, addressing concerns, gaining commitment, and delivering the desired customer experience. In addition, employees gain a deeper understanding of how to create an environment for relationship expansion and prospecting through teamwork, referrals and customer loyalty.

“You don’t close a sale, you open a relationship.”

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