

## Financial Sector Helpline for International Clients

### Challenge

Clients of a major German bank call the customer support center (CSC) when they need assistance with foreign transactions.

The staff of the CSC are well trained specialists who know their company's range of products and services well, and are able to help and advise their clients.

Increasingly, the CSC is receiving calls from non-German-speaking clients. The questions and their answers remain unchanged – it is just that they are in English rather than in German.



### Training Targets

To enable the CSC staff to understand the questions and concerns of the bank's English-speaking clients and to answer such queries politely and professionally.

### Training Solution

A five-day workshop following an intensive needs analysis phase.

**Pre-training:** Observation of the CSC staff operating in German. This defined the training target: the quality of service given in German had to be replicated in English. Analysis of the questions asked and the answers given to clients in order to isolate the language and vocabulary used. Development of a work-specific glossary and language pack. Development of a series of work-relevant training scenarios. Placement testing to identify potential participants (CEF B1+).

**Training:** Exercises to learn the target vocabulary and language needed for specific situations, were followed by controlled practice. Customer-specific audio recordings demonstrated the essence of specific client calls and requests. Participants practiced calls of increasing complexity with peer and trainer feedback.