

FBLA Client Service Case Study

Participant Instructions

1. You have 10 minutes to review the case.
2. Presentation time is five minutes. At four minutes the timekeeper will stand and at five minutes the timekeeper will stand and hold up a colored card indicating time is up.
3. The presentation is interactive with the judges who will ask questions throughout the presentation. A judge will play the role of a National Bank of America customer. You will play the role of the customer care representative for the bank.
4. Each participant will be given two note cards.
5. Be prepared to answer questions posed by the judges.

Performance Indicators

- Logical solution is selected and presented with positive and negative aspects of its implementation given.
- Thoughts and statements are well organized and clearly stated; appropriate business language is used.
- Demonstrate ability to effectively communicate with customer.
- Explain an effective, efficient, and spontaneous action for customer service.
- Empower yourself to give efficient, accountable customer service.
- Exhibits good decision-making and problem solving skills.

Case Study Situation

You work for the National Bank of America (NBA) as a Customer Care Representative for online bill payments in one of its Customer Care centers. NBA is one of the largest banks in the US and has offices throughout the country.

The NBA online bill pay function allows customers to manage and pay their bills using their computer. Customers go to the bank's Web site, input payment details, and schedule payment to arrive before a bill's payment due date. The bank then electronically transfers or mails a check to your creditor in payment of your bill. Your bank guarantees that all payments will arrive by the payment date you specified.

You will be fielding a call from a customer (Judge). After introductions, you should "answer the call" with the following greeting:

"National Bank of America, this is _____ (your name). How may I help you?"

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