

Case study

EI in Customer Service

This client, a large Australian bank was shifting from a transactional, product-focused approach to a more relationship-driven Customer Guidance model. While well received, there were concerns that current recruitment and training programs lacked emotional intelligence (EI) competencies essential for effective customer engagement.

To support their vision of becoming the leader in customer experience, the bank aimed to embed EI competencies into recruitment and training of new Personal Banking Consultants, ensuring they could build trust and have meaningful financial conversations.

Project Components

- Mapped the Personal Banking Consultant role requirements against the EQ-i 2.0 Model.
- All short-listed candidates completed an EQ-i 2.0 assessment.
- Developed an assessment centre focussed on experiential activities to test desired EI competencies.
- Targeted questions based on the individual's EQ-i 2.0 profile.
- Induction program focussed on developing emotional intelligence and conversational tactics as a priority over product/ technical knowledge.
- EQ360 tool used for internal applicants for associated coach/ leadership roles.

Outcomes

The successful candidates:

- Were noticeably more curious, open to learning, empathetic, optimistic, and willing to play with new techniques during training.
- Hit the ground running in terms of quick up take of their role and desired behaviours, as measured by the coaches during weekly catch ups.
- Customer feedback showed the new cohorts were assertive and empathetic, resulting in the customer being more open to sharing their relationship with money.



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