



**CAREER CLUSTER**

Finance

**INSTRUCTIONAL AREA**

Customer Relations

**FINANCIAL SERVICES  
TEAM DECISION MAKING EVENT**

**PARTICIPANT INSTRUCTIONS**

- The event will be presented to you through your reading of the 21<sup>st</sup> Century Skills, Performance Indicators and Case Study Situation. You will have up to 30 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), followed by up to 5 minutes to answer the judge's questions. All members of the team must participate in the presentation, as well as answer the questions.
- 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.
- Problem Solving – Make judgments and decisions, and solve problems.
- Communication and Collaboration – Communicate clearly and show evidence of collaboration.
- Creativity and Innovation – Show evidence of creativity.

**PERFORMANCE INDICATORS**

- Explain the responsibilities of finance professionals in providing client services.
- Explain the nature of positive customer relations.
- Reinforce service orientation through communication.
- Identify company's brand promise.
- Determine ways of reinforcing the company's image through employee performance
- Identify desirable personality traits important to business.
- Maintain the confidentiality of others.

## CASE STUDY SITUATION

You are to assume the roles of two district managers for JEFFERSON BANK, each with ten branch locations in your districts. JEFFERSON BANK is known for “*valuing the customer before the coin.*” The president of the bank (judge) has asked you to create a presentation for bank employees on the importance of customer relations in response to customer complaints.

Over the past year, you both have received various complaints from customers of different branches within your districts regarding customer service. The complaints prompted that a customer service survey be mailed and/or emailed to all JEFFERSON BANK customers. Looking at the results, the surveys revealed many trouble areas with bank tellers, loan officers and general staff. The bank president (judge) has asked you to create a presentation focusing on customer relations that will be given to all JEFFERSON BANK employees. Based on customer survey feedback, the following areas have been identified as needing attention:

- Importance of meeting and exceeding client expectations
- Importance of customers’ understanding of the information employees communicate
- Employee knowledge of the bank’s brand promise
- Institution relationships with the community
- Importance of confidentiality
- Connection between employee personality and positive customer relations

You will present the information you will include in the presentation to the bank president (judge) in a role-play to take place in the president’s (judge’s) office. The president (judge) will begin the role-play by greeting you and asking to hear your presentation. After you have presented the information and have answered the president’s (judge’s) questions, the president (judge) will conclude the role-play by thanking you for your work.

## JUDGE'S INSTRUCTIONS

You are to assume the role of president of JEFFERSON BANK. JEFFERSON BANK is known for “*valuing the customer before the coin.*” You have asked two district managers (participant team), each with ten branch locations in their districts, to create a presentation for bank employees on the importance of customer relations in response to customer complaints.

Over the past year, the two district managers (participant team) have received various complaints from customers of various branches within their districts regarding customer service. The complaints prompted that a customer service survey be mailed and/or emailed to all JEFFERSON BANK customers. Looking at the results, the surveys revealed many trouble areas with bank tellers, loan officers and general staff. You have asked the district managers (participant team) to create a presentation focusing on customer relations that will be given to all JEFFERSON BANK employees. Based on customer survey feedback, the following areas have been identified as needing attention:

- Importance of meeting and exceed client expectations
- Importance of customers’ understanding of the information employees communicate
- Employee knowledge of the bank’s brand promise
- Institution relationships with the community
- Importance of confidentiality
- Connection between employee personality and positive customer relations

The two district managers (participant team) will present the customer service presentation to you in a meeting to take place in your office. You will begin the meeting by greeting the district managers (participant team) and asking to hear the information.

After the district managers (participant team) have presented the information, you are to ask the following questions of each participant team:

1. How often should we survey our customers to learn if the presentation was effective?  
Should we also survey our employees to ensure the presentation was effective?
2. What can we do to motivate our employees to maintain positive relationships with our customers?
3. How can we regain customers’ trust in our brand?

Once the district managers (participant team) have answered your questions, you will conclude the meeting by thanking them for their work.

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

## JUDGING THE PRESENTATION

Team members, assuming the role of a management team for the business represented, will analyze a case situation related to the chosen occupational area. The team will make decisions regarding the situation, and then make an oral presentation to the judge. The role of the judge is that of an executive for the business.

Participants will be evaluated according to the Evaluation Form.

Please place the name and identification number label on the Scantron sheet (unless it has already been done for you).

Participants will have a 30-minute preparation period and may make notes to use during the role-play.

During the first 10 minutes of the presentation (after introductions), the team will present their analysis, their decisions and the rationale behind the decisions. Allow the teams to complete this portion without interruption, unless you are asked to respond.

During the next 5 minutes, you may ask questions of the team to determine their understanding of the situation presented. Each member of each team should respond to at least one question. To ensure fairness, you must ask each team the same questions. After asking the standard questions, you may ask other questions for clarification specific to the current team.

After the questioning period, please thank the team and state that they will be notified of your decision soon. Then complete the Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points. The presentation will be weighted at twice (2 times) the value of the exam scores.

A maximum score of “Exceeds Expectations” in any category means that, in your opinion, the information is presented effectively and creatively; nothing more could be expected of an employee.

A “Meets Expectations” rating means that the information is present well. Though there may be a few minor problems or omissions, they are not significant. Creativity, however, is not shown to any great degree. A combined total score of 70 or better on the written and presentation sections will earn the participant team DECA’s Certificate of Excellence at the international conference.

A “Below Expectations” score means that the information presented does not meet minimum standards of acceptability.

A “Little/No Value” score means either that some major flaw has been noted that damages the effectiveness of the presentation (this may be a major omission, a serious misstatement or any other major flaw) or that the information presented is of no value (does not help the presentation at all).

We hope you are impressed by the quality of the work of these potential managers. If you have any suggestions for improving the event, please mention them to your series director.

*We thank you for your help.*



**FINANCIAL SERVICES TEAM DECISION  
MAKING, 2018**

**JUDGE'S EVALUATION FORM**  
DISTRICT EVENT

**INSTRUCTIONAL AREA**  
Customer Relations

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

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

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

Did the participant:

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
<b>PERFORMANCE INDICATORS</b>						
1.	Explain the responsibilities of finance professionals in providing client services?	0-1-2-3	4-5-6	7-8	9-10	
2.	Explain the nature of positive customer relations?	0-1-2-3	4-5-6	7-8	9-10	
3.	Reinforce service orientation through communication?	0-1-2-3	4-5-6	7-8	9-10	
4.	Identify company's brand promise?	0-1-2-3	4-5-6	7-8	9-10	
5.	Determine ways of reinforcing the company's image through employee performance?	0-1-2-3	4-5-6	7-8	9-10	
6.	Identify desirable personality traits important to business?	0-1-2-3	4-5-6	7-8	9-10	
7.	Maintain the confidentiality of others?	0-1-2-3	4-5-6	7-8	9-10	
<b>21<sup>st</sup> CENTURY SKILLS</b>						
8.	Reason effectively and use systems thinking?	0-1	2-3	4	5-6	
9.	Make judgments and decisions, and solve problems?	0-1	2-3	4	5-6	
10.	Communicate clearly and show evidence of collaboration?	0-1	2-3	4	5-6	
11.	Show evidence of creativity?	0-1	2-3	4	5-6	
12.	Overall impression and responses to the judge's questions	0-1	2-3	4	5-6	
<b>TOTAL SCORE</b>						