

FACT SHEET

Professional Development Session

Managing Your Customer's Experience



The National Finance Institute



This professional development session must be combined with others to create a customised half-day session.

What does the course cover?

What type of experience do you want your customers to have when conducting a mortgage transaction through your business? Obviously a good one, but how do you want them to feel at every stage? How can you make them remember the experience in a positive light?

You can tactfully design a customer experience that will produce your pre-determined outcomes. This 2 hour session will teach you the basics of developing a positive customer experience.

After completing this session, you will start to look at mortgage transactions through your customer's eyes.

- Learn the critical factors to consider when developing a 'customer experience'
- How to appeal to your customer's senses to make the experience memorable
- Why the 'big end of town' are designing experiences rather than just products
- How to tap into your customer's feelings and form lifelong relationships as a result.

Are there any CPD points available for this session?

This session has been designed to contribute toward the Mortgage Industry Association of Australia's (MIAA) continuing professional development (CPD) requirements. The CPD points allocated, for each session may vary according to the level of technical knowledge involved. As an indication, mortgage industry related educational workshops are allocated 3 points per day or 1.5 points per session. However, these courses shouldn't be considered a 'point accumulation exercise', but rather a means to create a competitive edge over your rivals.

What happens if I attend, but don't gain any benefit?

If you attend an NFI professional development course and for any reason it does not prove to be an experience that can help you establish, or greatly improve, your career as a mortgage professional, you will receive a 100% refund upon request at the completion of the course. We make this guarantee because we believe 100% in the results our courses deliver.

Who has this session been developed for?

This session has been developed for owners and managers of mortgage broking firms. It is also particularly relevant to managers and support staff of aggregation, franchise and other large mortgage companies.

How long will this course take to complete?

This session is two hours duration. It is to be combined with other available sessions to make a half-day training course.

When are the courses scheduled?

Courses can be conducted to suit your schedule. We can arrange a venue or it can be held at your training room. We require 20 participants to conduct a course.

What materials/equipment do I need?

A workbook is supplied at the commencement of the course. You only need to bring a pen.

How much does a professional development course cost?

Prices range from \$115 to \$225 per person.

What will I receive?

You will receive a course workbook and Certificate of Attendance.

When does the course start and finish each day?

Courses generally start at either 9am or 1pm, depending on the time constraints of the group.

What should I wear to the training and what is the arrangement for lunch?

Smart casual is expected as a minimum dress standard by all students. You are responsible for organising your own lunch unless notified otherwise.

How do I arrange a course?

Please call Client Services on 1300 765 400 – we'd be delighted to hear from you.

Phone:
1300 765 400

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07 3822 6003

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Version 121004