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**2011 NLC FBLA CLIENT SERVICE**

**FINAL 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 hold up a card indicating one minute left 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 customer from Juniper Bank. You work for America’s Bank as the customer care representative for bill payments.
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
* 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 America’s Bank (AB) as a Customer Care Representative for bill payments in one of its Customer Care centers. AB is one of the largest banks in the United States and has offices throughout the country. AB has recently acquired Juniper Bank and its 50,000 credit card accounts.

There have been several mailings to customers from both Juniper Bank and America’s Bank about the acquisition. New America’s Bank credit cards were issued and mailed to all Juniper account holders.

You will be fielding a call from a customer (judge). You should “answer the call” with the following greeting:

*“America’s Bank, this is \_\_\_\_\_ (your name). How may I help you?”*

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**JUDGES’ NOTES**

**JUDGING THE PRESENTATION**

1. This is a role-playing event with you acting in the role of a customer from Juniper Bank.
2. Review the Judges’ Instructions and the Case Study Situation. You may have one judge serve as the customer and ask questions, or each judge may vary the problem and ask questions. Remember, what you do for one presentation, must be done for all presentations.
3. After introductions, you need to explain the reason for the call and ask for some action to resolve the problem.
4. This is an interactive problem, so treat the presentation as a conversation. Time allowed is five minutes.
5. You will close the event.
6. Complete the rating sheet.

**JUDGES’ INSTRUCTIONS**

In this performance, the judge will assume the role of a Juniper Bank customer.

You always pay your bills on time to avoid late fees and to maintain your high credit score. You realize you have not received a Juniper bill for the past couple of months, and you call the customer service number on your last bill dated three months ago.

When you reach a Customer Service Representative, you immediately notice they say, “America’s Bank” and say, “I am trying to reach Juniper Bank.” You explain that you have not received a bill lately. You want them to fax the bill to you and make sure your credit score will not be affected.

Your goal is to have the bank cancel the accrued late fees, restore your credit limit to its previous amount and issue a new credit card.