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**2010 SLC CLIENT SERVICE**

**PRELIMINARY 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 former Vista Credit Card 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
* 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 are a Customer Care Representative for Vista Credit Card Company. You handle cardholder inquiries and complaints received via the company’s toll-free number. Your calls include inquiries about card balances, payments, cash advances, account cancellations, and other account-related topics.

The company recently added new fees, increased its late fees and raised interest rates in anticipation of Federal legislation that will place restrictions on additional fees and increasing rates.

Many customers closed their accounts when informed of the new changes and are still being billed for past services.

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

*“Vista Credit Card Company, this is \_\_\_\_\_ (your name). How may I help you?”*

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**2011 SLC CLIENT SERVICE**

**PRELIMINARY CASE STUDY**

**JUDGES’ NOTES**

**JUDGING THE PRESENTATION**

1. This is a role-playing event with you acting as an unhappy customer that formerly had an account with Vista Credit Card.
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 former Vista Credit Card Company cardholder.

Six months ago, you switched to a credit card that had no annual fee and a lower interest rate than your Vista card. You paid the outstanding balance on your Vista card in full and cancelled your account.

The cancellation process had been difficult. The Vista Customer Care Representative had transferred you to the company’s “Save” department where another representative pressured you to not cancel the card. After five minutes of convincing the “Save” representative you no longer had need for the card, you were told that your account would be closed.

Five months later, you received a statement from Vista showing an amount due of $29, the annual fee for the card. You spent 10 minutes on hold listening to the same bad music over and over frequently interrupted by ads for credit card services before finally reaching a Vista agent.

You asked why you were being billed an annual fee when you had cancelled the card five months ago. After another 15 minutes of being on hold while the representative researched the issue, you were assured that the fee would be removed and your account would be closed.

A month later, you received another statement from Vista showing your account (which you had been assured was closed) was past due in the amount of $29 plus a $15 late fee and a finance charge of $1. You now owe Vista a total of $45.

You want Vista to zero out your current balance and send you a letter confirming that the account is closed.