

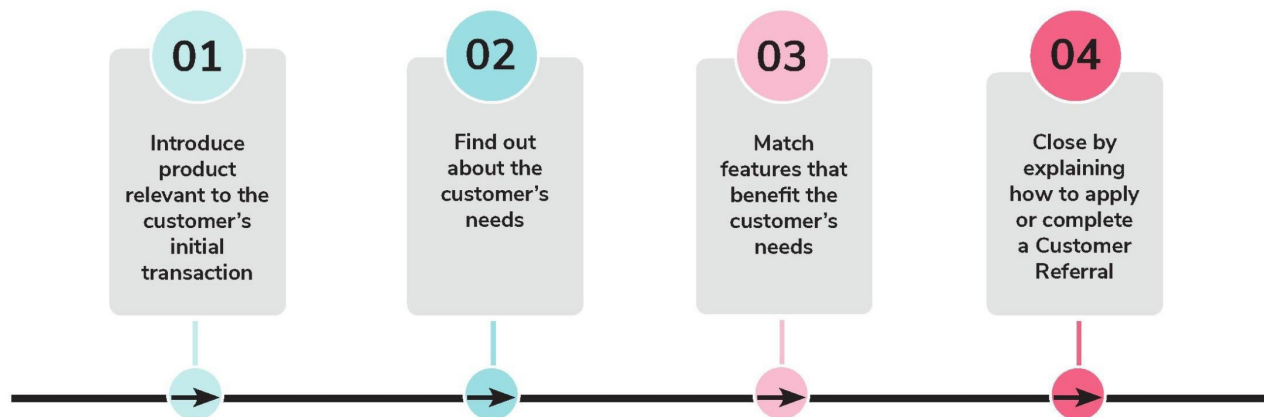
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SECTION 18 FINANCIAL SERVICES PRODUCTS V4.0

POLCC 51/23 REVIEW: 13/06/2024

Financial Services Products

The 4-step approach



The 4-step approach is a simple process that will help you identify how you can help the customer:

1. How will you introduce the product?
2. What questions will you ask to find out whether the customer is interested?
3. How will you match the features and benefits of the product whilst ensuring the conversation is compliant and remembering our principles of treating customers fairly?
4. How will you close?

Examples

Please write your answers in the spaces below.

1. What products could you introduce to a customer asking for a driving licence application form?
2. What about a customer who wants to renew their passport via the Passport Check & Send service?
3. What if a customer was paying by debit card?

Customer Referrals on Horizon

From the Horizon 'Home Screen', select 'Customer Referrals'.

Select only the product(s) the customer has a genuine interest in and follow the on-screen prompts – Horizon will let you know if a field is required or optional.

All customers who provide a mobile number will instantly receive a text message verification.

All customers who provide an email address will receive an email with a link to the relevant Post Office product website.

Customers who are interested in life insurance will receive a call from the contact centre.

Remember to remind the customer to enter your 'branch response code', also known as a 'Branch Code' or 'FAD Code' when they apply online.

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