



INTERVIEW QUESTIONS FOR A CRM CANDIDATE

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Interview Questions for a Client Relationship Manager (CRM) Candidate

SCENARIO 1: DISCUSSION

One of our clients has just rung you to inform you that their spouse passed away. How would you handle the call? What actions would you take as the result of this call (if any)? Thinking of the client experience, what would you suggest that our business could do in situations such as this one? Please discuss.

SCENARIO 2: DISCUSSION

One of our top clients rings the office wishing to speak to his financial planner (who is currently unavailable) and sounds agitated. How do you handle the call? What actions would you take post the call? Please discuss.

WRITING TEST: EXAMPLE 1

All new clients agree to pay a fee to have a Financial Plan built for them. Getting this stage right is critical for securing longevity of this relationship.

Mr & Mrs Blogs have a Financial Plan presentation meeting booked for next week, we arranged this meeting in line with our service standards. After checking with third party providers that all information we required would be available, it has today come to light that crucial pension information, which is required for this meeting, may not be available until the week after.

Please write an email to Mr & Mrs Blogs, informing them of a delay to their Financial Plan presentation meeting based on the above information.

WRITING TEST: EXAMPLE 2

Mr Smith has several share certificates that he wishes to transfer to his central account. In order to fulfil his request, we sent him transfer forms to sign for each one. He has now returned the forms but has missed a signature on one.

Please draft a letter to Mr J Smith of 1 Paradise Avenue, Hollywood, Gloucestershire, GR5 9BJ from Alan Bloggs, Managing Director, requesting that he signs the remaining form.

EXAMPLE ACCURACY TEST & ANSWERS

By Paul Newton & Helen Bristoll

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