

PCS Courses

NOTE: The three courses in the PCS curriculum will be offered only through the end of 2012. LOMA is working on new course offerings to meet the needs of today's customer service professionals. The last opportunity for participants to complete the PCS under the current requirements is December 31, 2012. The last paper exams for PCS 391 and PCS 393 will be administered in May 2012, and the last paper exam for PCS 392 will be administered in November 2012. Learners may take I*STAR exams for these courses through December 31, 2012.

Required Courses	
Associate Coursework <i>ACS Designation: Completion of the ACS Program is not a requirement for enrollment in any PCS course. However, LOMA strongly advises that students complete ACS 100 Foundations of Customer Service before taking PCS courses.</i>	PCS 391 PCS 392 PCS 393

For more detailed information on this designation, please see the Education & Training Catalog.

Learners must earn the ACS designation and complete all three PCS courses to earn the PCS designation.

PCS 391—Customer Behavior: Consumer Behavior and Beyond explains the motivations, attitudes, and buying behavior of customers, including those who purchase insurance and financial services, as well as intermediary customers such as agents and brokers.

PCS 392—Customer Contacts: Strategies and Operations explores strategies and practices financial services organizations use to create value and build relationships through customer contacts.

PCS 393—Customer Relationship Management explains the theory and practical use of customer relationship management (CRM) in the financial services industry.

PCS Courses

Course Topics

PCS 391 – Customer Behavior: Consumer Behavior and Beyond

- Managerial Importance of Customer Behavior
- Three Roles of a Customer
- Market Values Customers Seek
- Financial Services Customers
- Determinants of Customer Behavior
- The Customer as a Perceiver and Listener
- Customer Motivation: Needs, Emotions, and Psychographics
- Customer Attitudes
- Market Differentiation and Segmentation
- Understanding Intermediaries as Customers
- Individual Customer Decision Making
- Household Customer Decision Making
- Business Customer Decision Making
- Understanding Consumers as Financial Services Customers
- Customer Loyalty to Products
- Relationship-Based Buying
- Creating Market Values for the Customer

PCS 392 – Customer Contacts: Strategies and Operations

- Overview of Customer Contacts
- Participants and Expectations
- Strategic and Tactical Planning
- Important Planning Issues
- Organizational Structure
- Workflow Processes
- Workforce Management
- Human Resources in Customer Contacts
- Managing Customer Contact Technology
- Types of Customer Contact Technology
- Knowledge Management in Customer Contacts
- Measuring and Reporting Customer Contacts

PCS 393 – Customer Relationship Management

- What is CRM?
- Preparing for CRM
- The Role of Customer Information
- Customer Privacy
- Customer Strategies
- Channel Strategies
- CRM Infrastructure: Processes, People, and Architecture
- Implementing CRM
- Measuring the Success of CRM
- Data Management
- CRM Systems