

Cultural Intelligence for Exceptional Client Greetings

Producer: Pre-work	<ul style="list-style-type: none"> ● Review the slides and directions for pre-work and make notes on any necessary personalization. ● Add names and photos to slide 3 ● Update Zoom settings for learners to enter on mute ● Prepare Mentimeter activity for slide 10 and add the Mentimeter link to the Agenda (link) ● Share agenda in Zoom chat ● Set up breakout rooms of 4-5 participants each in Zoom ● Answer any questions posted in Zoom chat
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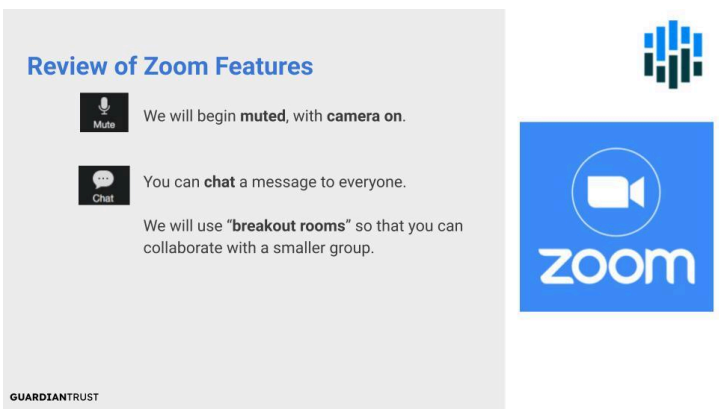
Facilitator Pre-Work:	<ul style="list-style-type: none"> ● Review the slides and directions for pre-work and make notes on any necessary personalization ● Provide photo and background to Producer for slide 3 ● Share the screen in Zoom
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Session 1		
Slide#	Approximate Timing	Topic
1-3	4 minutes	Introductions and Zoom Features
4-5	3 minutes	Welcome
6	3 minutes	Agenda & Meeting Norms
7	2 minutes	Objectives
8	2 minutes	Outcome
9	1 minute	Recall the Importance of First Impressions
10	4 minutes	Mentimeter









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11	3 minutes	Impact of First Impressions
12	5 minutes	Group Discussion Question #1
13-14	2 minutes	Examine Stereotypes and Implicit Biases Intro and Definitions
15-18	15 minutes	Breakout Rooms and Discussion
19-20	1 minute	Recognize Cultural Intelligence/ Empowering Your Curiosity
21	3 minutes	3 Factors of Cultural Intelligence
22-23	3 minutes	Distinguish Proper Greetings and 7 Steps
24-25	5 minutes	Important Reminder and Group Discussion
26	1 minute	Summary
27	3 minutes	Exit Ticket
Total:	60 minutes	



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Slide#) Duration	Slide	Facilitator Notes	Producer Notes
1		<p>Do: Give a one-minute verbal warning before starting the workshop.</p> <p>Say: <i>[before start time]</i> We will start in 1 minute.</p> <p><i>[at start time]</i> Hello everyone! Thank you for joining the GuardianTrust Banking Virtual Workshop. We will be discussing cultural intelligence for exceptional client greetings.</p>	<p>Check to make sure everyone is muted upon entering the meeting.</p> <p>Play music while everyone is entering the room.</p>
2		<p>Do: Advance slide. Check to make sure everyone is muted.</p> <p>Say: Let's review the Zoom Features we will use today. Everyone will begin muted, with their cameras on. You can chat a message to everyone. Later, we will use breakout rooms so that you can collaborate with a smaller group.</p>	<p>Check to make sure everyone's Zoom mic is muted.</p> <p>Continue to admit any late arrivals to Zoom.</p>





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3	<p style="text-align: center;">Introducing your Virtual Instructor and Producer</p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>Add information about the Virtual Instructor here.</p> </div> <div style="text-align: center;">  <p>Add information about the Producer here.</p> </div> </div> <p style="text-align: right; margin-top: 20px;"></p> <p style="font-size: small; margin-top: 20px;">GUARDIANTRUST</p>	<p>Do: Advance slide. Introduce yourself and your role. Allow the producer to introduce themselves.</p> <p>Say: Introduce yourself and your role.</p>	<p>Do: Continue to admit any late arrivals to Zoom.</p> <p>Say: Introduce yourself and your role.</p>
4	<p style="text-align: center;">Welcome! Let's chat.</p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;">  <p style="font-size: small; margin-top: 20px;">GUARDIANTRUST</p> </div> <div style="text-align: center;"> <p>Please find a link to the agenda for today shared in the chat.</p> <p><i>Time to chat!</i></p>  <p>Tell us your name, role, and your favorite breakfast food.</p> </div> <div style="text-align: right;">  </div> </div>	<p>Do: Advance slide. Give wait time for attendees to respond to the chat prompt. Read a few chat posts to the group.</p> <p>Say: Now, that everyone has arrived, let's chat. Please find a link to the agenda for today in the chat. Tell us your name, role, and your favorite breakfast food. <i>[Comment on a few posts]</i></p>	<p>Add to the chat: Tell us your name, role, and your favorite breakfast food.</p> <p>Share the agenda in chat.</p>
5	<p style="text-align: center;">Agenda</p> <p>This training will last 60 minutes.</p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;">  <p style="font-size: small; margin-top: 20px;">GUARDIANTRUST</p> </div> <div style="text-align: center;">  <ul style="list-style-type: none"> Introductions Welcome Meeting Norms Outcomes Objectives Summary Exit ticket </div> </div>	<p>Do: Advance slide</p> <p>Say: The training for today will last approximately 60 minutes. We have already covered the introduction and welcome. Next, we will go over meeting norms, our learning objectives, and outcomes. Then we will wrap everything up with a summary and exit ticket. A copy of our agenda has been posted in</p>	<p>Share the agenda again in chat.</p>



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		chat. Please access it and have it handy on your desktop or laptop.	
6	<div> <div> <h3>Review of Meeting Norms</h3> <ul style="list-style-type: none"> • Actively listen. • Treat one another with dignity and respect. • Practice open-mindedness. • Develop self-awareness. <p>GUARDIANTRUST</p> </div> <div>  </div> </div>	<p>Do: Advance slide. After reading the norms, ask if anyone has questions.</p> <p>Say: Now, it's time to review our meeting norms. Everyone should:</p> <ul style="list-style-type: none"> • Actively listen. • Treat one another with dignity and respect. • Practice open-mindedness • Develop self-awareness. <p>Does anyone have any questions about today's meeting norms?</p>	
7	<div> <h3>Learning Objectives</h3> <div> <div>Recall the importance of first impressions.</div> <div>Examine stereotypes and implicit biases.</div> <div>Recognize cultural intelligence.</div> <div>Distinguish proper greetings.</div> </div> <p>GUARDIANTRUST</p> </div> <div>  </div>	<p>Do: Advance slide.</p> <p>Say: Our learning objectives for this workshop will cover cultural intelligence for exceptional client greetings. We will cover how to:</p> <ul style="list-style-type: none"> • Recall the importance of first impressions. • Examine stereotypes. • Recognize cultural intelligence. • Distinguish proper greetings. 	

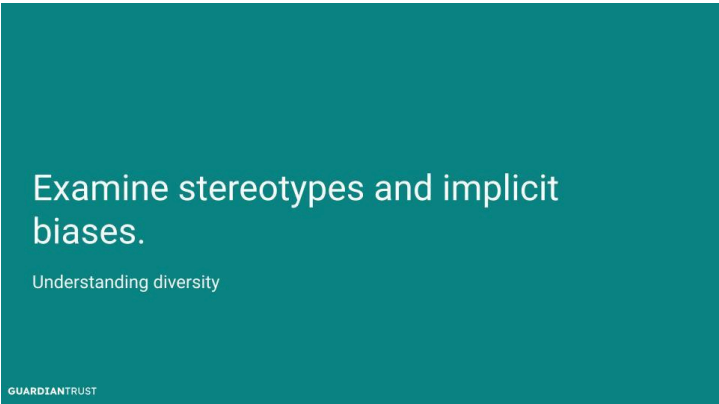
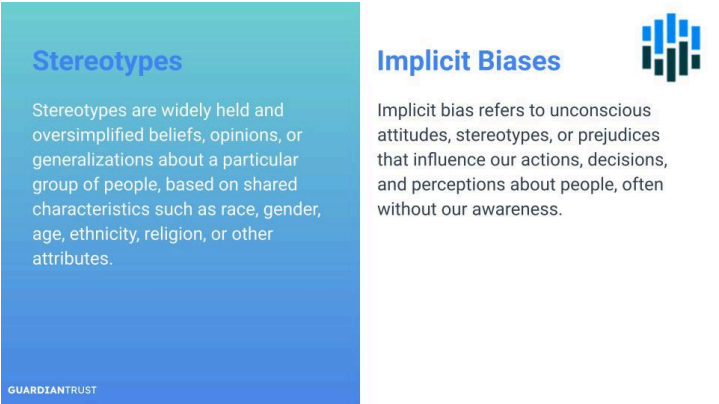
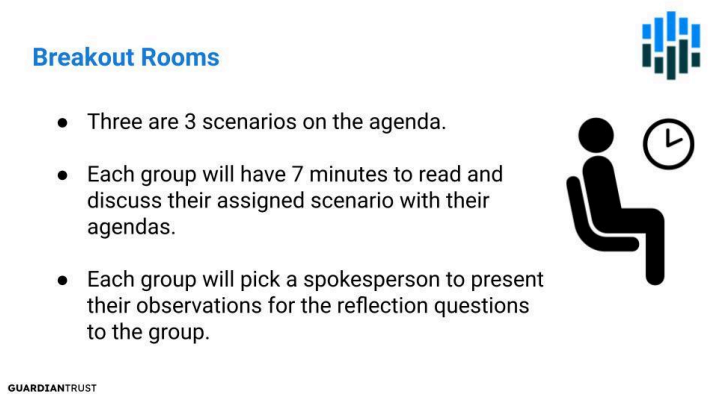
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8	<p>Today's session</p>  <p>Outcome When I meet new clients I can give a great first impression, put aside any bias, build cultural intelligence, and greet new clients properly.</p>  <p>Importance of first impressions Stereotypes and implicit biases Cultural Intelligence Proper greetings</p> <p>GUARDIANTRUST</p>	<p>Do: Advance slide. After you read the Outcome, click to reveal define, explore, build, and learn.</p> <p>Say: The outcome expected for today is that when you meet new clients you can give a great first impression, put aside any bias, build cultural intelligence, and greet new clients properly.</p>	
9		<p>Do: Advance slide.</p> <p>Say: The first topic is to recall the importance of first impressions.</p>	<p>Prepare to share the Mentimeter poll.</p>
10	<p><i>[review the results with the group]</i></p> <p>Why are first impressions so important in client meetings?</p> <ul style="list-style-type: none"> ★ 95% of people believe first impressions are very important ★ 61% of people believe they can instantly spot a "phony" ★ 79% of people believe they usually or always make a good first impression <p>SCIENCE = PEOPLE</p>  <p>GUARDIANTRUST</p>	<p>Do: Display and discuss the Mentimeter poll. Set a timer on slide for 2 minutes. Give a one-minute warning before the timer is done. Finally, review the results in Mentimeter with the group.</p> <p>Say: Why are first impressions so important in client meetings? The Mentimeter poll link has been shared in the chat. Please click the link in chat to</p>	<p>Share the Mentimeter Poll link in the chat.</p> <p>Next share Mentimeter Poll with the group at the end of 2 minutes.</p>


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		access the Mentimeter. You can read the facts on this slide if you finish early. Everyone has 2 minutes to enter their response to Mentimeter. Then we will review as a group.	
11	<p>What is the impact of a good first impression?</p>  <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="background-color: #0056b3; color: white; padding: 10px; width: 30%;"> <p>Why do first impressions matter at work?</p> <p>A first impression becomes a filter that we use for all future interactions with that person. It can be very difficult to change someone's first impression of us.</p> </div> <div style="border: 1px dashed #ccc; padding: 10px; width: 60%;"> <p><i>"We all see the world through our own filters and make judgements based upon them.</i></p> <p>A good first impression impacts your networking. This kind of social capital can have long lasting effects on your personal and professional life.</p> <p>-Elizabeth Perry</p> </div> </div> <p><small>GUARDIANTRUST</small></p>	<p>Do: Advance slide. Read the left side of the slide. After, tell participants to read the right side on their own. Give them 30 seconds.</p> <p>Say: What is the impact of a good first impression? Why do first impressions matter at work? A first impression becomes a filter that we use for all future interactions with that person. It can be challenging to change someone's first impression of us.</p>	
12	<p>Group Discussion</p> <p>Question 1:</p> <p>What are the potential consequences of a negative first impression?</p>  <p><small>GUARDIANTRUST</small></p>	<p>Do: Advance slide. Give participants 60 seconds to post their answers. Discuss any answers given either verbal or written.</p> <p>Say: It's time for our first group discussion. What are the potential consequences of a negative first impression? Please unmute yourself or post your answers in chat.</p>	Post question in the chat.



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13	 <p>Examine stereotypes and implicit biases.</p> <p>Understanding diversity</p> <p>GUARDIANTRUST</p>	<p>Do: Advance slide.</p> <p>Say: Our next objective is to examine stereotypes and implicit biases.</p>	<p>Prepare the breakout rooms. Time rooms for 7 minutes.</p> <p>And reshare the agenda in the chat.</p>
14	 <p>Stereotypes</p> <p>Stereotypes are widely held and oversimplified beliefs, opinions, or generalizations about a particular group of people, based on shared characteristics such as race, gender, age, ethnicity, religion, or other attributes.</p> <p>Implicit Biases</p> <p>Implicit bias refers to unconscious attitudes, stereotypes, or prejudices that influence our actions, decisions, and perceptions about people, often without our awareness.</p> <p>GUARDIANTRUST</p>	<p>Do: Advance Slide</p> <p>Read both definitions aloud or ask for a volunteer to read them aloud.</p> <p>Say: <i>[read slide aloud]</i></p>	
15	 <p>Breakout Rooms</p> <ul style="list-style-type: none"> • There are 3 scenarios on the agenda. • Each group will have 7 minutes to read and discuss their assigned scenario with their agendas. • Each group will pick a spokesperson to present their observations for the reflection questions to the group. <p>GUARDIANTRUST</p>	<p>Do: Advance slide. Show where to find the scenarios in the agenda.</p> <p>Say: For these topics, you will be separated into breakout rooms. There are 3 scenarios. Each group will have 7 minutes to read and discuss their assigned scenario. You will use the questions on the agenda to guide your group discussion.</p>	<p>Breakout rooms should be ready.</p> <p>Post agenda link with scenarios in chat.</p> <p>Screen share the agenda as the facilitator is talking about it.</p> <p>Finally, send groups to breakout rooms after</p>

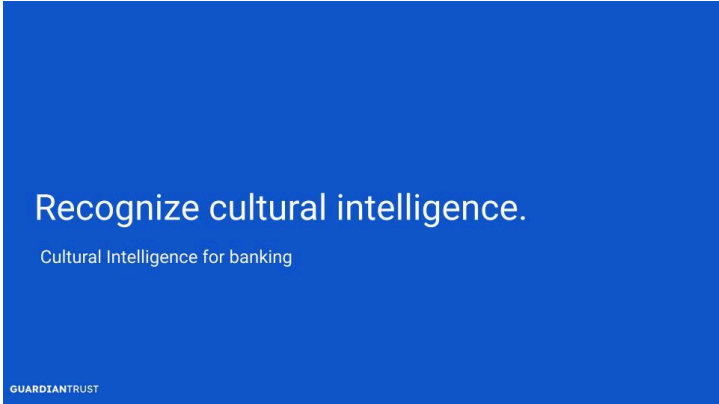
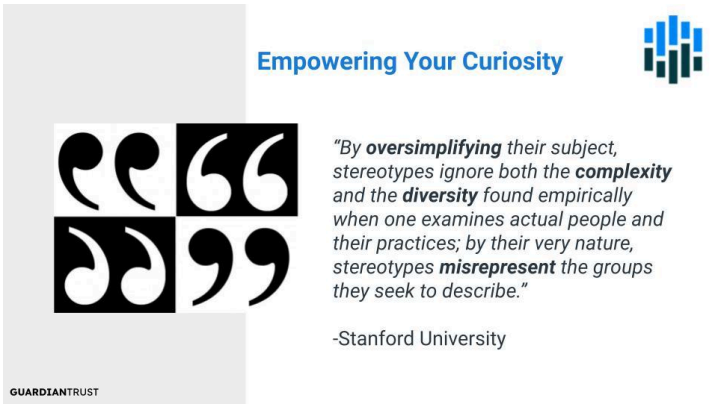
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		<p>Then, after the discussion, each group will pick a spokesperson to present their group's observations. Group 1, you are assigned to Scenario 1. Group 2, you are assigned to Scenario 2, and Group 3, you are assigned to Scenario 3. You will find the scenarios at the end of the agenda which has been posted in the chat again if needed. The scenarios begin on page 2 of the agenda.</p>	<p>scenario assignments are given.</p>
I6	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 45%;"> <p>Understanding Diversity GROUP 1 SCENARIO</p> <p>Sarah is assigned to meet with a new client to discuss opening a banking account. The client, Mr. Rodriguez, is of Hispanic descent. Sarah has a preconceived bias against individuals of Hispanic background and assumes that Mr. Rodriguez might not be financially stable or might have questionable legal status. During the meeting, Sarah subtly asks intrusive questions about Mr. Rodriguez's immigration status and income.</p> <p><small>GUARDIANTRUST</small></p> </div> <div style="width: 45%; text-align: center;">  <p><small>*GROUP REFLECTION QUESTIONS ARE ON THE AGENDA</small></p> </div> </div>	<p>Do: Set timer for 7 minutes. Advance slide. After breakout rooms have been closed, show Scenario 1 and call on Group 1's spokesperson to share their observations.</p> <p>After the break out groups return and the spokesperson presents, make sure the group addresses Sarah's bias. Be prepared for a group discussion.</p> <p>Say: <i>[read Scenario 1]</i> OK, spokesperson for Group 1 please share your observations.</p> <p>Remark on bias if no one brings up Sara's bias: Sarah's unconscious <u>racial</u> bias affects her ability to provide equal and fair service to the client, making Mr. Rodriguez feel uncomfortable and unwelcome.</p>	<p>Keep a timer. Set timer for 7 minutes. Give a 1-minute warning in chat to all participants at 6 minutes. Close breakout rooms at 7 minutes.</p>

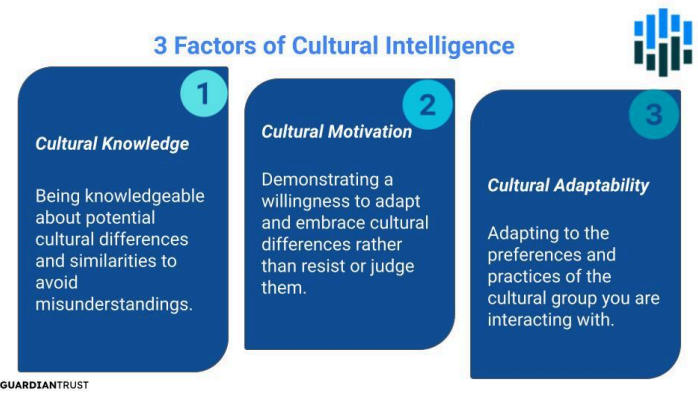

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17	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 30%;"> <p>Understanding Diversity GROUP 2 SCENARIO</p> <p>John is tasked with assisting a new client, Mrs. Smith, who is a senior citizen. John has a bias against older clients, assuming they may be technologically challenged and not interested in modern banking services. During the meeting, he pushes Mrs. Smith towards traditional banking methods and ignores her questions about online banking. He also makes condescending comments about her understanding of technology, which he would not have made if the client were younger.</p> <p><small>GUARDIANTRUST</small></p> </div> <div style="width: 10%; text-align: center;">  </div> <div style="width: 60%;"> <p><small>*GROUP REFLECTION QUESTIONS ARE ON THE AGENDA</small></p> </div> </div>	<p>Do: Advance slide. Share Scenario 2 and call on Group 2's spokesperson to share their observations.</p> <p>After the break out groups return and the spokesperson presents, make sure the group addresses John's bias. Be prepared for a group discussion.</p> <p>Say: <i>[read Scenario 2]</i> OK, spokesperson for Group 2 please share your observations.</p> <p>Remark on bias if no one brings up John's bias: John's <u>age</u> bias affects Mrs. Smith's banking experience and leaves her feeling undervalued.</p>	
18	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 30%;"> <p>Understanding Diversity GROUP 3 SCENARIO</p> <p>Alex is assigned to meet with a new client, Ms. Pack, who is a successful businesswoman. Alex has a gender bias that leads him to assume that women are less financially savvy than men. During their meeting, he frequently interrupts Ms. Pack, offers her basic financial advice she didn't ask for, and suggests that she consult her husband before making any major financial decisions.</p> <p><small>GUARDIANTRUST</small></p> </div> <div style="width: 10%; text-align: center;">  </div> <div style="width: 60%;"> <p><small>*GROUP REFLECTION QUESTIONS ARE ON THE AGENDA</small></p> </div> </div>	<p>Do: Advance slide. Share Scenario 3 and call on Group 3's spokesperson to share their observations.</p> <p>After the break out groups return and spokesperson presents, make sure the group addresses Alex's bias. Be prepared for a group discussion.</p> <p>Say: <i>[read scenario 3]</i> OK, spokesperson for Group 3 please share your observations.</p> <p>Remark on bias if no one brings up Alex's bias: Alex's <u>gender</u> bias affects Ms. Pack and she may consider switching banks.</p>	



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		Congratulate everyone on their observations.	
19		<p>Do: Advance slide.</p> <p>Say: Our next topic is how to recognize cultural intelligence for banking.</p>	Mute participants.
20		<p>Do: Advance slide. Ask if anyone wants to read this slide.</p> <p>Say: [if no volunteers- read slide content aloud]</p>	

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21	<p>3 Factors of Cultural Intelligence</p>  <p>1 Cultural Knowledge Being knowledgeable about potential cultural differences and similarities to avoid misunderstandings.</p> <p>2 Cultural Motivation Demonstrating a willingness to adapt and embrace cultural differences rather than resist or judge them.</p> <p>3 Cultural Adaptability Adapting to the preferences and practices of the cultural group you are interacting with.</p> <p><small>GUARDIANTRUST</small></p>	<p>Do: Advance slide. Slide will animate with clicks. Read slide information upon click to reveal.</p> <p>Say: Let's examine 3 factors of cultural intelligence. <i>[read slide content aloud]</i></p>	
22	<p>Distinguish proper greetings.</p> <p>A greeting can set the tone for an entire interaction.</p> <p><small>GUARDIANTRUST</small></p>	<p>Do: Advance slide.</p> <p>Say: Finally, we are going to take a look at how to distinguish proper greetings.</p>	
23	<p>Distinguish Proper Greetings in 7 Steps</p>  <p>Get the name right Speak to them formally by using their surname.</p> <p>Observe the hierarchy Introduce less senior people to more senior people.</p> <p>Say who you are Say why you are there and what you do.</p> <p>Stand up Helps you make eye contact.</p> <p>Look them in the eye Indicates engagement and focus.</p> <p>Smile Be welcoming and inclusive.</p> <p>Take the initiative with a handshake Be assertive and confident.</p> <p><small>GUARDIANTRUST</small></p>	<p>Do: Advance slide. Slide will animate with clicks. Read slide information upon click to reveal. <i>[read slide content aloud from right to left. Start with 'Stand Up']</i></p> <p>Say: Let's take a look at how to distinguish proper greetings in 7 steps.<i>[read slide content aloud from right to left]</i></p>	

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24	<p>Important to remember</p>  <p>Clear and precise communication is always important. People from different cultural backgrounds have different physical appearances and communication styles.</p>	<p>Do: Advance slide.</p> <p>Say: Let's remember: <i>[read slide content aloud from the blue box]</i> [not on slide] For instance, a handshake may seem very respectful, however, it is not in every culture.</p>	
25	<p>Scenario</p> <p>Kenneth walks into a client meeting a few seconds late, and introductions are concluding.</p> <p>What are 3 things Kenneth should do immediately?</p> <p><i>Let's talk about it.</i></p> 	<p>Do: Advance slide. Give wait time (30-45 seconds) after you read the question. Discuss the answers after the group shares their thoughts.</p> <p><i>[Group answers should reflect the proper greetings in 7 steps from slide 23]</i></p> <p>Say: Now it's time to look at a scenario. For instance, Kenneth walks into a client meeting a few seconds late, and introductions are concluding. What are 3 things Kenneth should do immediately? <i>[give wait time]</i> Please unmute yourself to answer or type your answer in chat.</p>	

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Summary



GUARDIANTRUST

Cultural intelligence **empowers** us to:

- *Build* stronger client relationships
- *Provide* better service
- *Contribute* to the overall success of **GuardianTrust**

By embracing this value, we can create a more **welcoming and inclusive atmosphere**.

Do: Advance slide.

Say: To summarize what we've covered, cultural intelligence **empowers us to:** *Build* stronger client relationships

- *Provide* better service
- *Contribute* to the overall success of GuardianTrust

By embracing this value, we can create a more **welcoming and inclusive atmosphere** that benefits both clients and employees.
[not on slide] **Understanding and appreciating the diversity of our client base is essential for maintaining a positive and inclusive banking environment.**

27

Exit Ticket



What is your big takeaway from today? What is something you can implement right away?
Share your responses in the chat!



GUARDIANTRUST

Do: *After you read the slide.* Read aloud some answers in chat. Finally, dismiss your workshop group on time. Read several of the responses in chat aloud.

Say: Our last activity for today is to share: What is your big takeaway from this workshop? Is there something you can implement right away? Share your response in chat.

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		<p><i>[Before the Zoom closes, thank the group for participating and wish them a good day.]</i></p> <p>Thank you for attending our workshop today, everyone did a great job! Have a wonderful day!</p>	
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