

NAME: _____ Month/Day of Birth: ____/____

Organization: _____

Email address: _____ Tel# _____



Develop the key skills essential to successful customer service and relationship-building. Gain a broad understanding of bank products to be able to better cross-sell products and services. Learn ways to cultivate relationships with customers and discover tactics for responding to customer needs. Become better able to successfully resolve customer problems and objections. By completing the ABA Customer Service Representative Certificate curriculum, you'll strengthen your ability to provide a quality customer service experience.

REQUIRED COURSES:

GRADE	DATE COMPLETED	COURSE	DELIVERY OPTIONS				
			L	W	SP	ILO	GL
		Banking Basics Suite <i>or</i> Principles of Banking <i>or</i> Banking Fundamentals			•		
			•	•		•	•
						•	
		Communication Basics Suite			•		
		Dealing Effectively with Co-Workers	•		•		
		Effective Referrals Suite			•		
		Ethical Issues for Bankers	•		•		
		Online Communication Suite			•		
		Overcoming Objections			•		
		Relationship Sales Suite <i>or</i> Introduction to Relationship Selling			•		
			•				
		Understanding Bank Products <i>or</i> Deposit Accounts and Services	•		•		•
			•			•	•
		Verbal Communication Suite <i>or</i> Effective Telephone Communication			•		
			•				

		Why Quality Customer Service Matters Suite			•		
		<u>or</u> Quality Service	•				•
		Written Communication Suite			•		
		<u>or</u> Effective Written Communication	•				
		<u>or</u> Written Communication	•	•			•
		(Certificate in Business Communication may be applied as requirement for Verbal <u>or</u> Written Communication)			•		

L= Live W=CFTEA Webcourse SP= Self-paced Online ILO = Instructor-Led Online GL = Guided Learning

PLEASE CONTACT THE CFTEA OFFICE FOR CONFIRMATION OF COMPLETION WHEN APPROACHING COMPLETION OF A CERTIFICATE OR DIPLOMA