

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

Organization: _____

Email address: _____ Tel# _____

This certificate is designed for bankers who are responsible for the sales function in a bank, whether or not they have salespeople reporting directly to them. It will provide skill development appropriate for a sales leader.

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			•		
			•	•		•	•
						•	
		Ethical Issues for Bankers <i>or</i> Ethics in the Workplace	•		•		
			•		•		
		Relationship Sales Suite <i>or</i> Introduction to Relationship Selling			•		
			•				
		Effective Meetings <i>or</i> Meetings that Work			•		
			•				
		Employee Recognition <i>or</i> Rewards and Recognition			•		
			•				
		Coaching to Support the Sales Process Suite* <i>(fka Sales Coaching in the Bank)</i>			•		
		Successful Sales Campaigns*			•		
		<i>or</i> Sales Management* <i>*you must take 2 of the 3 sales class offerings</i>	•				•

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