

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

Organization: _____

Email address: _____ Tel# _____



Develop the key skills for catering to a new customer mindset. Explore multiple ways to fulfill customers' sales, service, and referral needs as their single point-of-contact. Master cash handling and basic transactional skills. Perfect product and service sales skills. Discover ways to build relationships and create referrals to other lines of business.

By completing the ABA Universal Banker Certificate curriculum, you'll be able to grow into your role as a reliable point-of-contact for customers.

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 Meetings <i>or</i> Meetings that Work			•		
			•				
		Ethical Issues for Bankers <i>or</i> Ethics in the Workplace	•		•		
			•		•		
		Managing Change	•		•		
		Online Communication Suite			•		
		Overcoming Objections			•		
		Relationship Sales Suite <i>or</i> Introduction to Relationship Selling			•		
			•				

		Presentation Skills Suite <u>or</u> Verbal Communication <u>or</u> (Certificate in Business Communication may be applied as requirement for Verbal <u>or</u> Written Communication)			•		
			•	•			
					•		
		Verbal Communication Suite <u>or</u> 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 <u>or</u> (Certificate in Business Communication may be applied as requirement for Verbal <u>or</u> Written Communication)			•		
			•				
			•	•			•
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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