



ABA

Alabama Bankers Association, Inc.

Live Seminar

Universal Banker Certification

Credits – 11 CPE

May 22 & 23, 2019

[Hyatt Regency Hotel](#)

We are pleased to announce the Universal Banker Certification Program. With reduced in-branch transactions and customer visits and increase in technology, less traditional teller functions are needed. No longer can a frontline team member say: "It's not my job!" Today's frontline team is shifting from traditional positions (tellers, new account representatives, financial service representatives, etc.) to a multi-tasking, "universal" banker. Today's customer base is shifting from the traditional, visit the bank twice a week to quick response, electronic banking relationship with the bank.

This **two-day certification** program focuses on the essentials for today's universal banker in providing exceptional service, making referrals, and building profitable relationships from millennials to baby boomers. The Certification Program is packaged full of checklists, job aids, case studies, examples, and "real world" situations. Attendees will receive a Certification of Completion.

KEY OBJECTIVES:

- Understanding the Changing Role of Retail Banking
- Defining and Developing the Universal Banker
 - Core Competencies for the Universal Banker
 - Defining Professionalism for Today's Bankers
 - Etiquette and Netiquette Tips and Tools
 - Representing the Bank and Networking

- Becoming the One Source for the Exceptional Customer Experience
- Moving from Order Taker to Relationship Banker
- Maximizing the Customer On-Boarding Process
- Making Referrals as Simple as A-B-C
- Meeting the Needs of Today's Customers
 - Focus on Baby Boomers
 - Focus on Generation X
 - Focus on Generation Y (Millennials),
 - Focus on Generation Z

- And much more...

The benefits of this certification process include:

- An investment in developing "best practices" for your bank's retail network.
- An educational resource for training and career development and retention.
- Recognition and opportunities for frontline team members.
- A foundation builder for banking schools.
- A commitment to successful, profitable, efficient and effective retail banking network.

What is the Process for Certification?

This is a comprehensive certification program that focuses on three key components:

1. Completion of the Universal Banker Certification Program.
2. Completion of assessment before and after attending the Certification Program.
3. Annually attending one ABA workshop to re-certify each year.

PRESENTER: Dianne Barton

WHO SHOULD ATTEND: All Retail bank employees in customer contact positions

QUESTIONS? Call Debbie Pharr at (334) 386-5735.

By registering for this seminar, you give your permission to be photographed and for those photographs to be used by the association.

ABA Cancellation Policy: A processing fee of **\$100** applies to all cancellations. We will gladly refund 100 percent of your registration fee (minus \$100 processing fee) if notice is given by 12:00 noon, 10 business days before an event. After 10 business days, no money can be refunded, credited or transferred, although substitution of a participant is welcomed. **Schools and sessions 2 days or more, cancellation processing fee ~ \$200 or more TBD.**

Late Registration: Please note, there will be a \$50 late registration fee for all attendees that register later than 10 business days before the seminar.

Non-ABA Members: Prepayment is required for all non-member attendees for any event.

Early Bird Rates: When applicable, to qualify for the early bird rate, full payment **MUST** be received by advertised date. Otherwise, additional billing for the regular rate will be necessary.

Note: If registrant has received any manual/handouts prior to cancellation, no money can be refunded, credited or transferred.