

# The Universal Banker Certification Program

*Today's and Tomorrow's Customer Service Representative*  
Live, Virtual Program



**May 17 & 18, 2021**  
Live, Virtual via Zoom  
Quality programming from  
the comfort of your office!

## About the Program...

We are pleased to announce the **Universal Banker Certification Program**. Due to the ongoing pandemic 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 also receive a Certification of Completion.

**Length of Program: 2 days**

**Target Audience: All Retail bank employees in customer contact positions**

## Key Program 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 education 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

# Program Details...

## Who Should Attend

Branch Managers, Retail Branch Administrators, Marketing Directors, Head Tellers, Customer Service representatives and others with customer service responsibilities will benefit from this certification program.



## Schedule Both Days

8:45 am	Registration Log into Zoom Platform
9:00 am	Program
NOON	Lunch Break
1:00 pm	Program
4:00 pm	Adjourn

## About Our Presenter - Dianne Barton

Dianne Barton is the Founder & President of Performance Solutions, Inc., a training and consulting company that specializes in providing solutions to the key challenges facing community banks today in attracting, selling & servicing their customers. As a former banker, her service, which includes a broad scope including strategic planning, leadership and management development, regulatory & compliance implementations, retail growth strategies, and sales & service culture development, is recognized as "real world solutions" by both regional banks and community banks.



## About the Zoom Platform

Our two-day Universal Banker certification program will be conducted on the Zoom platform. Upon registration attendees will receive a link to the two days of training and copies of the materials that will need to be printed for the program. Having these documents printed will provide attendees with the information needed to successfully participate in the program. Please note, the materials and hookup link will arrive several days prior to the start of the session. Questions? Ask Courtney Campbell at 304-254-9822.

## Program Fees

- CBWV Member**      **\$395**       **CBWV \*Non-Member**      **\$790**

## CBWV Cancellation Policy

Written or faxed program cancellations received seven (7) days prior to the program will receive a full refund. Cancellations received six (6) days or less prior to the program are subject to a \$75 cancellation fee. Cancellations received the day of a program will forfeit registration fees entirely. Substitutions are welcomed and encouraged up to and including the day of the program.

**Seminar Dates**      **May 17 & 18**  
**Cancel By:**      **May 12**



# Universal Banker Certification May 17 & 18, 2021

*Presented Live, Virtual via Zoom*

## REGISTRATION INFORMATION

*\*Please fill out separate form for each attendee*

Bank Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Registrant Name \_\_\_\_\_

Registrant Email for materials \_\_\_\_\_

## PAYMENT INFORMATION

Member (\$395 Per Attendee)

Non-Member (\$790 Per Attendee)

\$ \_\_\_\_\_ Amount Enclosed

### We Accept Visa, MasterCard & Amex

Check     Credit Card     Invoice

Name as appears on card \_\_\_\_\_

Card Number \_\_\_\_\_

Expiration Date \_\_\_\_\_ Phone Number \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Email Address \_\_\_\_\_

### Return to CBWV by May 12, 2021

101 N Kanawha St, Ste. 201, Beckley, WV 25801

Phone 304.254.9822     Fax 304.929.2485

Questions: Call/email Courtney Campbell 304.254.9822  
or [courtney33@wvacb.com](mailto:courtney33@wvacb.com)

