

ABA eLearning

FOR CALL CENTER REPRESENTATIVES

Call Center Representatives perform a variety of service related activities including: processing loan and deposit account applications; describing the **features and benefits of the bank's products and services**; fielding questions on behalf of departments across the institution and **resolving customer problems** associated with business and retail customer accounts. **Sales skills** are an important component of this position as CSRs may also make outbound calls promoting bank products to both existing and prospective customers.

ABA eLearning offers self-paced online courses that teach a Call Center Representative how to conduct basic banking transactions and cross-sell bank products and services while exhibiting excellent customer service. Successful CCRs respond to customer needs with a thorough understanding of retail products and services and resolve customer problems, supporting the customer relationship, which is a cornerstone of bank growth. The AIB Call Center Representative Certificate can be achieved through the completion of courses that address sales and customer service, regulatory compliance, business ethics and banking fundamentals.

Core Knowledge

- Banking Today
- Introduction to Financial Planning Products
- Introduction to IRAs
- Understanding Bank Products

Sales and Customer Service

- Building and Retaining Customer Relationships
- Cross-Selling Deposit Products
- Effective Referrals
- Introduction to Relationship Selling
- Referring Insurance & Annuities
- Referring Mutual Funds & Services
- Referring Trust Customers
- Revitalizing Customer Service

Workplace Fundamentals

- Business Etiquette
- Dealing Effectively with Co-Workers
- Ethical Issues for Bankers
- Managing Time at Work
- Sexual Harrassment in the Workplace
- Telephone Etiquette
- Writing Bank Correspondence

Regulatory Compliance for Call Center Representatives

- Americans with Disabilities Act (ADA)
- Bank Secrecy Act (BSA)
- Electronic Funds Transfer Act, Regulation E
- Expedited Funds Availability Act, Regulation CC
- Fair Credit Reporting Act (FCRA)
- Office of Foreign Asset Control (OFAC)
- Privacy for Customer Contact Personnel
- Reserve Requirements of Depository Institutions, Regulation D
- Truth in Savings Act, Regulation DD
- USA PATRIOT Act

Certificate

- AIB Call Center Certificate Curriculum