



# Southeast Regional Center for Financial Training, Inc. eLearning Packages

Phone (904) 354-4830

**Choose a Content Package specific to an area of banking such as banking fundamentals or customer service. We can work with you to design a Content Package specific to your needs and goals.**

**Please check out these self-paced online options. The attached enrollment form may be used to sign up for these courses, or call Lisa Phillips for more details.**

## **Banking Industry Fundamentals:**

Many banks are going "back to basics" when it comes to banking knowledge and customer service.

Our Banking Industry Fundamentals courses help employees who are new to banking develop a basic knowledge of banking principles, concepts and operations. They will also learn about the many products a bank offers its customers and how to recognize and match a customer's need to a product. Customer service skills and the application of those skills in sample customer interactions are also covered. And this package also includes training on workplace fundamentals such as ethical and appropriate behavior.

### *Banking Industry Fundamentals Courses Include:*

- Banking Today
- Ethical Issues for Bankers
- Revitalizing Customer Service
- Sexual Harassment in the Workplace
- Understanding Bank Products

## **Business Banking Skills:**

Ninety-five percent of all business banking customers are small business owners. It's up to your staff to be able to obtain and grow those accounts. Business Banking Skills will provide your staff with the skills and knowledge needed to improve their level of confidence to gain and maintain customer relationships.

Learners will become knowledgeable about products and services relative to the small business market. The life of an account will be reviewed to offer skills that address a variety of customer-facing challenges. Handling objections is addressed as part of a plan to execute the perfect sales call. Learners will be given tools to engage customers to better understand their needs and offer appropriate solutions. Post-sale, techniques are shared to manage relationships, as well as to identify cross-selling opportunities.

### *Business Banking Skills Courses Include:*

- Fundamentals of Small Business Banking
- Introduction to Analyzing Financial Statements
- Personal Tax Return Analysis
- Credit Products for Small Businesses
- Deposit Products and Services for Small Businesses
- Retirement Products for Small Businesses
- Calling on Small Business Customers
- Relationship Selling to Small Business Customers
- Servicing and Growing Small Business Relationships

## **Customer Service:**

Excellent customer service and the relationships it creates and builds are cornerstones of bank growth.

Our Customer Service courses introduce your staff to a sales cycle which focuses on building customer relationships through needs-based selling techniques. From basic customer service skills to customer segmentation techniques, and a 4-step cross-selling sales process, this program offers a comprehensive approach to maximizing your bank's relationship with its customers.

### *Customer Service Courses Include:*

- Building and Retaining Customer Relationships
- Cross Selling Deposit Products
- Introduction to Relationship Selling
- Revitalizing Customer Service



**Please contact Lisa Phillips at (904) 354-4830 for more information or to register today!**