



# 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 consumer lending or sales skills. 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.**

## Teller Training Essentials:

Our Teller Training Essentials can reduce teller training time by as much as 50% and teller training cost by 20% - 60%, while improving learned knowledge and retention. Learners will be taught basic terminology and processes, as well as fundamentals of their role, and quickly be ready to work the line with a more experienced teller.

Tests at the end of each module determine knowledge retention and the ability to apply concepts learned.

Easily integrated into your existing new hire program, Teller Training Essentials will help speed onboarding and provide consistency in training throughout your branches.

### *Teller Training Learning Objectives Include:*

- |                     |                              |
|---------------------|------------------------------|
| All About Checks    | All About Deposits           |
| Balancing           | Check Cashing Process        |
| Counting Money      | Set up cash drawers          |
| Currency and Coins  | Endorsements                 |
| Fraud               | Importance of Identification |
| Payment Processing  | Robbery                      |
| Savings Withdrawals | Your Roles as a Teller       |

## Sales Skills:

The success of your bank is directly related to your staff's ability to positively interact with your clients, recognize profit-based opportunities, expand relationships, and close the sale.

This suite of courses offers training in retail banking sales for branch staff and new hires. Sales Skills covers all aspects of building and maintaining a successful retail banking relationship; establishing customer relationships, cross-selling and effective referrals; the categories of consumer credit, the financial needs of small business owners; sales campaigns and coaching and teleconsulting. This program is an effective way for your staff to quickly and comprehensively build the skills they need to maximize business opportunities in the retail arena.

### *Sales Skills Courses Include:*

- Building and Retaining Customer Relationships
- Cross-Selling Deposit Products
- Effective Referrals
- Fundamentals of Consumer Lending
- Fundamentals of Small Business Banking
- Introduction to Relationship Selling
- Revitalizing Customer Service
- Sales Coaching in the Bank
- Successful Sales Campaigns
- Teleconsulting

## Consumer Lending Fundamentals:

Profitable and prudent lending to consumers is a basic pillar of banking. Lenders need to execute sound lending policies to minimize risk, while allowing the bank to serve their customer base and make money.

- \* *Strengthen your knowledge of key lending principles.*
- \* *Increase knowledge of lending products so you can better address customer needs.*
- \* *Better understand the application and credit analysis and approval process.*

Our Consumer Lending Fundamentals courses teach the basics of consumer credit, including terminology, categories of credit, determining credit worthiness for various credit products including mortgages, and the application process. Learners will also acquire greater knowledge of the products and services offered by banks and the importance of correctly matching those to a customer's needs.

### *Consumer Lending Courses Include:*

- Banking Today
- Consumer Credit Products
- Fundamentals of Consumer Lending
- Fundamentals of Mortgage Lending



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