

# Get started today with ABA Banking Foundations

Proven Professional Development

ABA's comprehensive library of online training to develop essential banking knowledge and skills

In today's environment of rapid change, having a well-trained staff is key. And people make all the difference in a bank's success. To help ensure successful onboarding and ongoing professional development, start with Banking Foundations. Over 100 courses, eight industry-recognized certificates and 23 toolkits and exercises are expertly curated to target key skills such as consumer banking, customer service, sales and bank management—in all areas of the bank.



Shorter, to the point lessons for maximum impact with minimum time commitment



Quick, skill-based lessons that can be applied on the job immediately



Interactive lessons using real-world scenarios

## Full course listings inside

For more information, contact Duncan Taylor.



**EDUCATION**  
WASHINGTON BANKERS ASSOCIATION

Questions?  
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Investing in a well-trained staff improves employee retention and helps grow your business. Content is designed by bankers for bankers, and is expertly produced with current best practices in corporate education.

- Courses are mobile-accessible
- Incorporates video, audio and animations with closed-captioning
- Self-checks validate understanding via true-to-life scenarios and formal assessments
- Suites, designed around a curriculum of short courses, provide comprehensive learning paths
- Access through ABA's Learning Management System (LMS) or your existing LMS

## Certificates

Develop your employee's expertise as they earn an industry-recognized certificate. Banking Foundations includes eight certificate curriculums in these key banking job roles.

- **Bank Teller**
- **Branch Manager**
- **Customer Service Representative**
- **Personal Banker**
- **Supervisor/Team Leader**
- **Universal Banker**
- **Small Business Banker**
- **Bank Solutions Provider**

# Banking Foundations Course Listing

## Onboarding Basics

### Banking Basics Suite

- Bank Marketing: Building Customer Relationships
- Bank Payment Systems and Technology
- Bank Sales and Service: Expanding Customer Relationships
- Banks and Personal Wealth Management
- Banks and the Deposit Function
- Banks and the Economy
- Banks as a Business
- Business and International Banking Services
- Introduction to Banking
- Lending as a Cornerstone of Banking
- Safeguarding Bank Assets and the Nation
- Safeguarding the Customer and the Bank

### Teller Basics Suite\*

- Cash Handling
- Handling Checks
- Processing Transactions
- Providing Quality Customer Service
- Robbery and Bank Security
- The Changing Role of the Teller

### Ethical Issues for Bankers

### Understanding Bank Products

## Workplace Essentials

### Dealing Effectively with Co-Workers

### Essentials of Workplace Conduct

### Event Networking

### Managing Time at Work

### Sexual and Workplace Harassment

## Communication Skills

### Communication Basics Suite\*

- Becoming a Better Listener
- Communicating Effectively
- The Importance of Body Language

### Written Communication Suite\*

- Clarity in Writing
- Effective Email Communications
- Writing for Your Audience

### Verbal Communication Suite\*

- Effective Conversations
- Greetings and Introductions
- Handling Customer Concerns

### Online Communication Suite\*

- Effective Social Media Communication
- Social Media Etiquette

### Presentation Skills Suite\*

- Crafting Your Message
- Delivering Your Message
- Getting Started
- Presenting Virtually

## Customer Service Skills

### Why Quality Customer Service Matters Suite\*

- Customer Service Basics
- Handling Stress
- Handling Upset Clients
- The Importance of Communication
- The Importance of Customer Service
- Includes integrated toolkit & coaching guide

### Referring Insurance and Annuity Clients

### Referring Investment Clients

### Referring Trust Clients

## Management and Early Leadership Skills

### Management Essentials Suite

- Coaching
- Corrective Action
- Effective Meetings
- Employee Recognition
- Interviewing
- Managing Performance

### Leadership in Action Suite

- Authentic Leadership
- Building Collaborative Teams
- Communicating Vision
- Empowerment
- Managing Change

### Employment Law

### Improving Productivity

### Leveraging the Benefits of a Diverse Workforce

### Sexual and Workplace Harassment for Managers

## Consultative and Relationship Selling Skills

### Relationship Sales Suite\*

- The Relationship Sales Process
- Consultative Selling

### Sales Planning Suite\*

- Creating Sales Portfolios
- Managing Client Portfolios
- Planning a Call
- Includes integrated toolkit & coaching guide

### Making the Client Call Suite\*

- Calling on Clients
- Identifying Client Needs
- Presenting Solutions that Match Client Needs
- Includes integrated toolkit & coaching guide

### Effective Referrals Suite\*

- The Referral Process
- Making Referrals
- Includes integrated toolkit & coaching guide

### Overcoming Objections Suite\*

- Handling Client Questions
- Responding to Client Objections
- Closing and Following Up
- Includes integrated toolkit & coaching guide

### Coaching to Support the Sales Process Suite\*

- Managing Sales Performance
- Preparing to Coach
- Providing Ongoing Support
- Includes integrated toolkit & coaching guide

### Successful Sales Campaigns

### Tele-consulting

## Small Business Banking Essentials

### Fundamentals of Small Business Banking

- Small Business Basics
- Small Business Operating and Life Cycle

### Small Business Borrowing Suite\*

- Knowing Your Small Business Clients
- Communicating Credit Decisions
- Includes integrated toolkit & coaching guide

### Relationship Sales for Small Business Clients Suite\*

- Consultative Selling for Small Business Clients
- Generating Leads
- Preparing to Call on Clients
- Includes integrated toolkit & coaching guide

### Small Business Products Suite\*

- Presenting Credit Products
- Presenting Retirement Products
- Presenting Treasury Management Products
- Includes integrated toolkit & coaching guide

### Growing Small Business Relationships Suite

- Monitoring Small Business Relationships
- Conducting Site Visits
- Includes integrated toolkit & coaching guide

### Introduction to Analyzing Financial Statements

## Consumer Banking Essentials

### Fundamentals of Consumer Lending Suite

- Consumer Credit Basics
- Consumer Loan Processes

### Consumer Credit Products

### Handling Mortgage Inquiries and Making Referrals

### Introduction to IRAs

### Mortgage Customer Counseling and Prequalification

### Personal Tax Return Analysis

*\*Only available as a suite*



## Toolkits, Exercises and Coaching Guides

These integrated resources help learners and managers reinforce skills and apply their knowledge with checklists, role-playing exercises, self-assessments, scorecards, trackers, discussion guides and more.



## Get started today with ABA Banking Foundations

**100+**  
Courses

**8**  
Certificates

**23**  
Integrated toolkits,  
exercises and coaching

**Additional online  
courses from ABA  
are available in a  
license and can be  
added as needed.**

- Compliance
- Wealth Management and Trust
- Commercial Lending
- Risk Management
- Financial Crimes
- Bank Marketing
- Mortgage Lending
- Cybersecurity

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