

The Universal Banker Certification Program

Today's and Tomorrow's Customer Service Representative
Presented Live (Virtual) & In Person



May 25 & 26, 2022
Live, Virtual option or in person at
***The Satterfield Center for Community
Banking in Virginia***
VACB Office
7204 Glen Forest Dr. #101
Richmond 23226

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
- Professionalism for Today's Bankers
- Speaking the Customer Language - Communicating for Results
- 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
- Building Customer Loyalty
- Networking and Ambassadorship
- Meeting the Specific Generational Needs of Today's Customers
- Effectively Managing Difficult Customers Situations
- Handling Transactions Efficiently and in Compliance
- Managing time, planning ahead, and setting priorities
- And 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

All Retail Bank employees in customer contact positions.

Hotel Information

VACB does NOT have a block of rooms for this program. We do, however, have a negotiated rate of \$114 at the Hampton Inn, Glenside, single or double occupancy. To make a reservation, call the hotel DIRECTLY at 804-756-1777 and mention the Virginia Association of Community Banks | VACB to get our special rate. The hotel is located at: **Hampton Inn Glenside ♦ 5406 Glenside Drive ♦ Richmond, VA 23228**

Schedule Both Days

8:45 am	Registration & Breakfast
9:00 am	Program
NOON	Lunch Break
1:00 pm	Program
4:00 pm	Adjourn

About the PSI Team

Performance Solutions, Inc. (PSI), is a training and consulting company that has been a part of the banking community for over 35 years. PSI specializes in providing solutions to the key challenges facing banks today in attracting and building relationships with their customers.

About Our Presenter Christie Drexler



Christie has over 26 years of experience in the financial industry for community, regional and national banks. Her experience has been expansive to include successfully navigating retail, operations, treasury services, and commercial banking careers. She has served as a Regional Sales Manager, Chief Credit Officer, Chief Retail Officer, and Market/Division President. Christie is a passionate facilitator and coach with a focus on developing leaders.

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 25 & 26**

Cancel By: **May 18**

ADA Requirements

In order to accommodate a registrant with special needs, VACB needs to be notified of an attendee with any visual, hearing, or other impairment. Please complete the appropriate section provided on the Registration Form and be sure to include any FOOD allergies as well.



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VACB 7204, Glen Forest Dr., Ste 101, Richmond 23226

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 18, 2022

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

