



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, nine industry-recognized certificates and 23 toolkits and exercises are expertly curated to target key skills such as customer service, sales, bank management and consumer banking—in all areas of banking.



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 Monique White

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 nine certificate curricula in these key banking job roles.

- **Bank Teller**
- **Branch Manager**
- **Customer Service Representative**
- **Digital Banker – NEW**
 - Cybersecurity Fundamentals
 - Digital Banker Suite
- **Personal Bankers**
- **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 Business Bank Products

Understanding Consumer 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

Cybersecurity Fundamentals

Digital Banker Suite*

- Digital Beginnings
- Moving to Mobile
- Mobile Transactions
- Promoting Online Safety
- Digital Customer Service

Handling Mortgage Inquiries and Making Referrals

Introduction to IRAs

Mortgage Customer Counseling and Prequalification

Personal Tax Return Analysis



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

9
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

Full course listings inside

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