

AIB CUSTOMER SERVICE REPRESENTATIVE CERTIFICATE



NAME _____

DATE _____

The AIB Customer Service Representative Certificate addresses the knowledge and skills necessary to achieve superior performance in this important position within the bank. Customer Service Representatives (CSRs) conduct basic banking transactions and cross-sell bank products and services. Successful CSRs respond to customer needs with a thorough understanding of retail products and services and resolve customer problems with knowledge of pertinent bank policies and procedures.

In addition to courses that address sales and customer service, the curriculum also emphasizes regulatory compliance, business ethics and banking fundamentals. Basic selling and cross-selling skills are covered as well.

Required Courses:

You must complete the following courses.

Grade	Course	Delivery Methods	
	Banking Today		
	Building and Retaining Customer Relationships		
	Cross-Selling Deposit Products		
	Dealing Effectively with Co-Workers		
	Effective Referrals		
	Ethical Issues for Bankers		
	Introduction to Relationship Selling		
	Regulatory Compliance for Customer Service Representatives		
	Revitalizing Customer Service		
	Telephone Etiquette		
	Understanding Bank Products		
Applicants can purchase all of the required courses for this certificate as a self-paced online curriculum.			

The AIB Customer Service Representative Certificate meets the pre-certification education requirements for the Certified Customer Service Representative (CCSR) designation through the Institute of Certified Bankers (ICB).

AIB Certificate Code: 61

AIB

LEGEND	Self-paced Online Training	Classroom Training Materials	Instructor-led Online Training	Reference Materials
	Learning Extensions	Licensing Available	Correspondence Course	ICB Approved