

## Location & Details

Provided Virtually via Zoom  
technology Tuesday & Wednesday.

## Agenda

### March 05, 2024

5:30 p.m. Registration & Log In  
6:00 p.m. Program Begins  
8:00 p.m. Program Adjourns

### March 06, 2024

1:30 p.m. Registration & Log In  
2:00 p.m. Program Begins  
4:00 p.m. Program Adjourns

Choose your training night. The agenda and material covered will be identified but we're giving each attendee the option of which date they'd prefer to attend. Please note the times are different each day.

\*All times in EST

## Confirmation/ Cancellation

The IBA will send confirmations for its program. For more information contact Elizabeth DeHaven at 317-387-9380 or you may e-mail: [edehaven@indiana.bank](mailto:edehaven@indiana.bank). Within three or more business days prior to the day of an educational program, no cancellation charge will be assessed. Within two days prior, 50% of the fee is assessed. Refunds are not provided for cancellations the day before or absences on the day of the program. Substitutions are welcome at any time.

## Seminar Topics

### Professional Maturity

- Gain flexibility
- Manage your image
- What you say, how you say it
- Reputation
- Manage your emotions
- Confidentiality
- Courtesy, kindness and professionalism

### Follow Procedure

- Handle cash like a pro
- See to the details
- Be aware of your surroundings
- Maintain vigilant compliance

### Scrutinize Transactions

- Verification concerns
- Check cashing guidelines
- Identification rationale
- Dissecting transactions
- Fraudulent Schemes and Scams

### Provide Extraordinary Service

- Make their day
- What the customer wants
- Effective communication
- Five habits of highly effective tellers

### Ace Cross-Selling and Referrals

- Product knowledge proficiency
- Be inquisitive, engaging and prepared
- Spot opportunities; Start conversations
- Suggest solutions as the expert

### Master the Balancing Act

- Ten things you must do
- Six things you never do
- Avoid outages and interruptions
- Eliminate transpositions

## Virtual Certified Teller Program

# Frontline Excellence

previously  
Essential Teller Issues

**March 5, 2024**

6pm - 8pm

**March 6, 2024**

2pm - 4pm



8425 Woodfield Crossing Blvd,  
Suite 155E  
Indianapolis, IN 46240

## Program Overview

Frontline Excellence (previously referred to as Essential Teller Issues), is a program that covers 5 pivotal modules for today's frontline professionals. This program serves as an important reminder about the significance of their role, serving as the CEOs of the customer experience and reinforcing the importance of their actions and reactions as a reputation builder for your brand.

As an innovative addition, we have included an extra appendix module that houses a wealth of resources aligned with each module covered.

This program is information rich. Attendees leave with a renewed dedication to achieve excellence in their roles. Each attendee will leave with a comprehensive training manual, acting as a valuable workplace reference. Esteemed as the nation's most dynamic teller training experience, this presents a unique opportunity to elevate your entire front-line team toward an exceptional level of performance.

## Who Should Attend

Tellers, front-line professionals, anyone who has customer contact and those responsible for training and managing the customer experience

## Meet Your Presenter



**Vicki Kraai**  
CEO, InterAction Training

Vicki Kraai is CEO of InterAction Training. A company passionate about professional development training and education.

Vicki's 25+ years of Community Bank experience started at the family bank in rural Nebraska, serving as a bank teller and eventually becoming CEO. Vicki's many years of banking include credit card lending experience where she was a member of the management team that launched the Cabela's credit card program. She has a passion for developing people for success in the financial services industry. Banker's value Vicki's highly engaging "been there, done that" approach to all facets of her training and speaking engagements.

Vicki shares her expertise and experience as a faculty member for State Bank Association Schools and the Graduate School of Banking in Madison, WI.

Here's what attendees are saying:

Vicki was friendly and open to conversation, and she was easy to understand.

I wish Vicki would have had more time, but I really enjoyed the program

Vicki made me feel very excited to go back to work and play my role with a more inspiring attitude.

## Frontline Excellence

(Dept. 36)

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Name

Title

Email

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Title

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