

## Location & Details

This program will be provided virtually via Zoom on March 26, April 16, May 14 and June 25, 2026.

## Agenda

1:45 pm - Zoom Waiting Room Opens  
2:00 pm - Program Begins  
5:00 pm - Program Adjourns

## Meet Your Presenters



**Christie Drexler** is the Owner of Drexler Consulting, LLC, a financial services consulting and training business focused on developing purpose-driven, competent, servant leaders in all roles of banking. In association with Performance Solutions, Inc. and Dianne Barton, Christie has offered training and consulting services through Drexler Consulting, LLC, for the past five years. In addition, Christie has 26 years of direct experience in the financial services industry, working for both community and large regional banks. Her experience has been expansive to include successfully navigating retail and commercial banking careers.



**Josh Collins** has been creating content and facilitating courses as part of the Drexler Consulting team for the past two years. He has twelve years of direct banking experience serving in various leadership roles in retail banking, human resources, and talent development. Josh's background includes developing and facilitating banking, customer service, and leadership and culture development training programs.



## Program Overview

As in-branch transactions decline and technology advances, Front-Line Retail Team Members must deliver outstanding service in lean staffing models. Universal bankers need to be knowledgeable, client-focused, flexible, and proactive, serving both traditional and modern clients by shifting from order-taking to problem-solving, advising, and building loyal relationships.

This certification program equips modern Retail Bankers with skills for exceptional service, problem-solving, quality referrals, risk management, and building profitable client relationships. It includes practical tools like job aids, examples, checklists, and real-world scenarios. Attendees who complete the program will receive a Certificate of Completion.

## Who Should Attend?

Universal Banker Certification is a four-part, interactive, virtual learning series designed to provide a Retail Banker the tools necessary to build long lasting, loyal relationships with customers. Each session is 3 hours in length. All Retail Banking Team Members in customer contact roles including Tellers, Personal Bankers, Customer Service Representatives, Call Center Team Members, Retail Lenders, Universal Bankers, and their managers would benefit from this series.

# Virtual Universal Banker Certification Program

March 26, 2026

April 16, 2026

May 14, 2026

June 25, 2026

2:00 PM - 5:00 PM EST



## Series Topics

### Session 1: The Necessity of Universal Banking

- Master the Evolving Landscape of Retail Banking
- Drive Success with a Universal Banking Strategy
  - Ignite Team Buy-in with a Winning Culture
  - Tackle Challenges with Proactive Problem-Solving
  - Streamline Experiences for Stakeholder Satisfaction
- Unlock Essential Skills to Excel as a Retail Banker
- Your Banking Career Journey
  - Launch Your Path with Confidence
  - Plan Your Next Big Step
  - Build a Thriving, Long-Term Career in Banking

### Session 2: The Branding Differentiator

- Build Your Personal Brand
  - Craft a Powerful Personal Brand that Stands Out
  - Master Three Key Components of a Compelling Brand
  - Boost Your Brand's Visibility and Recognition
  - Embracing Civility as the Foundation of Our Social Contract
  - Leverage Communication Styles to Drive Results
- You are an Ambassador for the Bank
  - Elevate the Bank's Brand Through Your Personal Presence
  - Communicate with Clarity and Purpose
  - Champion the Bank's Values

## Series Topics

### Session 3: Value Added Banking

- Maximize Customer Onboarding Opportunities
  - Forge Strong Connections with Every Customer
  - Deliver Tailored Solutions to Meet All Customer Needs
- Master Time Management
- Minimize Losses
  - Master Risk Management to Protect the Bank
  - Avoid Common Pitfalls
  - Spot and Prevent Fraud to Safeguard Customers

### Session 4: Build Quality Relationships

- WOW! Service
- Simplify Referrals
  - Boost Referrals with Three Quick Steps
  - Uncover Customer Needs with Precision
  - Highlight Benefits that Resonate
  - Solve Something, Don't Sell Something
- Leverage Product Knowledge to Build Relationships
- Understand the Impact of Generational Influences

## Confirmation/ Cancellation

The IBA will send confirmations as requested for its programs. For more information contact Molly Gibbs at 317-387-9380 or [mgibbs@indiana.bank](mailto:mgibbs@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.

## Universal Banker Certification Program

(Dept. 26)

Bank/Firm \_\_\_\_\_

Phone \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

### Fees

#### Entire Series

First Registrant: \$795  
Additional Registrant: \$695  
All Non-Members: \$1,590

#### Single Session

All Members: \$250  
All Non-Members: \$500

#### Payment Information:

(Please circle one):  Invoice  VISA  MasterCard  AMEX

Cardholder Name \_\_\_\_\_

CVV Code \_\_\_\_\_

Card Number \_\_\_\_\_

Exp. Date \_\_\_\_\_



Register online at [indiana.bank](http://indiana.bank)