

Teller Training: Security, Safety & Service Coming Together



Active Shooter/Aggressors

Human Trafficking Red Flags

Elder Financial Exploitation

WOW Customer Service

Security Tips & Tools

Frauds & Scams

How to Make an Impact Every Day

**October 1, 2019
Shazam Education
Center,
Springfield, IL**



Course Introduction

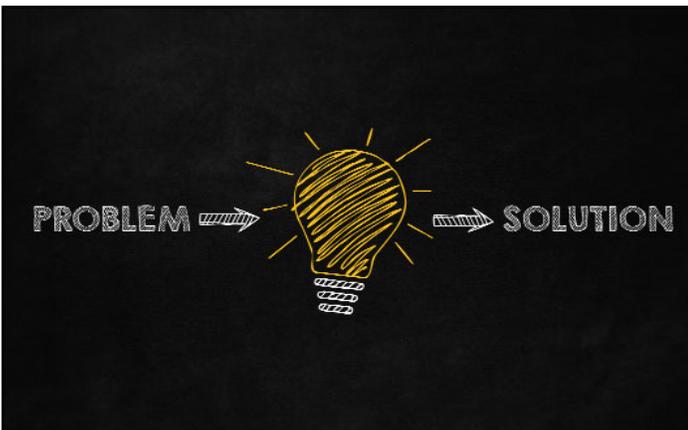
Our frontline has often heard that they are the eyes and ears of the bank? This workshop focuses on three of the most difficult challenges the frontline may ever face: human trafficking and human smuggling, elder financial exploitation, and active shooter and aggressors. We also highlight the importance of every team member's role in providing exceptional service. This fast-paced, information-packed evening seminar is full of "must-knows" and is designed to provide tools, tips and recommendations for providing exceptional service especially in threatening situations. Throughout the workshop, we use "real-world" examples and exercises to aid participants with the challenges facing today's retail branches. Participants leave the workshop with timely tools, job aids and a reference notebook.

Who Should Attend?

All frontline personnel — tellers, call center personnel, customer service representatives and new account specialists need to attend this program. Managers, assistant managers and trainers with ties to retail operations will not want to miss this program! This workshop is especially designed for the retail team and those who work with and/or support the team. Each participant will receive a manual that will serve as a valuable reference tool.

This program focuses on:

- Elements of WOW Customer Service
- How WOW Customer Service Can Minimize Fraud, Illegal Activity, and Hostile Situations
- What are the Major Types of Frauds and Scams?
- What are the Red Flags for Human Trafficking and Human Smuggling?
- How to Identify, Report and Minimize Elder Financial Exploitation
- Must Knows to Help Prevent and Prepare for Active Shooter/Aggressor Situations



About the Presenter



Dianne Barton

Dianne Barton is the founder and president of Performance Solutions, Inc., Kennesaw, GA, a training and consulting company that specializes in providing solutions to the key challenges facing community banks today in attracting, selling and servicing their customers. Her expertise in customer service, leadership and sales and service culture development is recognized as leading-edge by banks of all sizes. Her philosophy of experiential learning and participant involvement in training led to the development of her "TELL-SHOW-DO" training method that is skill-based, rather than theory-based. Before starting Performance Solutions in 1983, she held senior positions with Bank South Corporation, the Internal Revenue Service, and the John H. Harland Company, where she introduced its highly acclaimed Officer Call Program.

Key Topics

- Elements of WOW Customer Service – Treating Customers as Guests
- Preventative and Proactive Security Tips and Tools
- Textbook versus Real World Recommendations from Human Trafficking Victims
- Does Reporting Elder Financial Exploitation Really Make a Difference?
- What About Protecting Adults-at-Risk?
- Making a Difference
- Action Planning and Take-Aways

Registration Fees

Fees include hand-out materials, refreshment breaks, and lunch. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

Cancellation Policy

Registrants cancelling two days prior to each seminar receive 100% refund; one day prior, 50%; the day of the seminar, no refund. **All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all “no shows.”**

CBAI MEMBER

One person.....	\$265
Two or more from same banking institution.....	\$245 each

**PROSPECTIVE-MEMBER

One person.....	\$465
Two or more from same banking institution.....	\$445 each

CDD members receive a 10% discount.

**Only financial institutions/firms eligible for CBAI membership.

Please note that CBAI does not issue confirmations, with the exception of on-line registrations, but feel free to call the Association headquarters to confirm your registration.

Registration Form

**TELLER TRAINING: SECURITY, SAFETY & SERVICE
COMING TOGETHER
OCTOBER 1, 2019 - CBAI HEADQUARTERS, SPRINGFIELD**

Please Print

Name of Bank _____

Address _____

City, State, Zip _____

Tel. No. _____

Name/Title _____

(E-mail addresses are required for registration).

E-Mail _____

Name/Title _____

(E-mail addresses are required for registration).

E-Mail _____

I have special needs, please contact me before the seminar.

Please select your payment method.

Check Enclosed Check in Mail

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**If you are paying by credit card, please fill out the following information.
(Visa, MasterCard & Discover accepted).*

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901 Community Drive
Springfield, IL 62703-5184



Fax it in:
(217) 585-8738



Call it in:
(800) 736-2224 (Illinois only)
(217) 529-2265

Date and Location

October 1, 2019

CBAI Headquarters
901 Community Drive
Springfield, IL 62703
800/736-2224

Agenda

Registration begins at 8:30 a.m.
The seminar runs from 9 a.m. to
approximately 4 p.m. A Continen-
tal breakfast and lunch are
provided.

CBAI is a registered Public Ac-
counting Continuing Professional
Education (CPE) provider by the
Illinois Dept. of Financial and Pro-
fessional Regulation.

For More Information

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