



DURATION

25 -30 hours



DELIVERY CHANNEL

eLearning
+ Textbook



Modules:

- 1 Ethics
- 2 Products and Channels
- 3 Principles of Retail Banking
- 4 Customer Service Quality
- 5 Retail Banking Operations

eLearning

Professional Retail Banker

CREATE PROFITABLE AND SUSTAINABLE CUSTOMER RELATIONSHIPS

COURSE OVERVIEW & BENEFITS

The curriculum focuses on the key areas of retail banking that impact customer experience and customer outcomes. It provides an integrated understanding of the key functions of the retail bank that serve customer needs and create customer value.

Candidates are equipped with best practice principles of retail banking economic functions, risks, customer service quality and professional ethics that look beyond the bank product towards customer solutions.

Upon completion, Candidates will have laid the foundation for a successful career in customer-centric retail banking and be able to determine the right course of action by upholding ethical best practices that lead to sustainable customer relationships.

LEARNING OBJECTIVE

To create profitable and sustainable customer relationships by understanding how a customer-centric retail bank works.

COMPETENCIES GAINED

Candidates are able to:

- Identify the appropriate ethical behavior for retail bankers.
- Relate customer demand for banking products and services to the family life stages of wealth accumulation, wealth consolidation and wealth transfer.
- Assess how the omni-channel customer is influencing and shaping the delivery of retail banking services.
- Identify and understand the core economic functions of a retail bank and its core services.
- Identify and understand the core banking risks in credit risk, market risk and operational risk.
- Explain the importance of a customer-centric approach in retail banking by considering the role of a retail banker through the eyes of a customer.
- Identify the essential properties that underpin efficient operations and understand how to optimize bank processes.

INTENDED AUDIENCE

- Those who are considering a career in retail banking
- New entrants to retail banking
- Banking specialists who wish to gain a broader understanding of how a retail bank works

PATHWAY

Successful PRB Candidates may build on their fundamental knowledge by progressing onto the Certified Retail Banker (CRB) curriculum.

Retail Banking I is the first level of the CRB curriculum which provides Candidates with in-depth business acumen and the essential, practical competencies required across the breadth of the retail banking business.