



Upstate NY

CERTIFICATE REQUIREMENTS

Customer Service Certificate

Principles of Banking (3cr)
Customer Service (Min ½ cr)
Dealing Effectively w/ Co-Workers (Min ¼ cr)
Cross Selling Deposit Products (Min ¼ cr)
Effective Referrals (Min ¼ cr)
Business Etiquette (Min ¼ cr)
(Plus one of the following):
Ethical Issues (Min ¼ cr)
Deposit Accounts & Services (Min ½ cr)
TOTAL 5 credits

Team Leader Certificate

Principles of Banking (3 cr)
Dealing Effectively w/ Co-Workers (Min ¼ cr)
Managing Change (Min ¼ cr)
Meetings that Work (Min ¼ cr)
Presentation Skills (Min ¼ cr)
Coaching for Success (Min ¼ cr)
Rewards & Recognition (Min ¼ cr)
(Plus one of the following):
Writing Bank Correspondence (Min ½ cr)
Communication Skills (Min ½ cr)
TOTAL 5 credits

Account Specialist Certificate

Principles of Banking (3 cr)
Customer Service (Min ½ cr)
Communication Skills (Min ½ cr)
Business Etiquette (Min ¼ cr)
Intro to Relationship Selling (Min ½ cr)
Consumer Credit Products (Min ¼ cr)
Cross Selling Deposit Products (Min ¼ cr)
Effective Referrals (Min ¼ cr)
Ethical Issues (Min ¼ cr)
Managing Time @ Work (Min ¼ cr)
TOTAL 6 credits

Professional Teller Certificate

Principles of Banking (3 cr)
Business Math (3 cr)
Communication Skills (Min ½ cr)
Customer Service (Min ½ cr)
Marketing (3 cr)
Teller Training (Min ½ cr)
Security Training (Min ½ cr)
Deposit Accounts & Services (Min ½ cr)
Selling Skills (Min ½ cr)
TOTAL 12 credits

Intro Supervisor Certificate

Principles of Banking (3 cr)
Supervision (3 cr)
Communication Skills (Min ½ cr)
Customer Service (Min ½ cr)
Human Relations (3 cr)
Managing Performance & Productivity (Min ½ cr)
Ethical Issues (Min ¼ cr)
Interviewing & Hiring Techniques (Min ¼ cr)
Leadership Skills (Min ½ cr)
Managing Change (Min ¼ cr)
Motivating Your Staff (Min ¼ cr)
TOTAL 12 credits

Intro Human Resources Certificate

Principles of Banking (3 cr)
Human Relations (3 cr)
Human Resource Management (Min 2 cr)
Communication Skills (Min ½ cr)
(Plus one of the following):
Understanding Organizational Behavior (3 cr)
Employment & Labor Law (3 cr)
TOTAL 12 credits

PLEASE NOTE: In order to keep pace with the ever-changing financial services landscape, it is necessary for CFT to revise the course requirements of certain certificates from time to time. If you have already begun the process of completing the requirements for a specific CFT Certificate, you can do so under the previous guidelines.

If you have any questions, please call the CFT office at (315) 233-7242