

2026 Universal Banker Certification Series

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.

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.

Target Audience: 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.

Benefits of the Series:

- Serve Clients Proactively
- Build a Professional Brand
- Communicate for Impact and Results
- Become the Source for the Exceptional Customer Experience
- Move from Order Taker to Relationship Builder
- Maximize the Customer On-Boarding Experience
- Make Referrals Simple
- Build Client Loyalty in the Digital Era
- Expand Networking, Ambassadorship, and Business Development Skills
- Identify and Prevent Fraud
- Manage Difficult Customer Situations Effectively
- Handle Transactions Efficiently and In Compliance
- Do More with Less: Planning, Prioritization, and Productivity Strategies

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Drexler Consulting, LLC is an Alliance Partner of Performance Solutions, Inc.

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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

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

Universal Banker Certification

Facilitators:



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 twenty-six 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. She has served as Division President, Market President, Chief Credit Officer, Chief Retail Officer, and Regional Sales & Service Manager. Christie has a B.S. in Finance from Berry College and an MBA from Georgia College and State University. She is a passionate facilitator and coach who strives to live the values and leadership strategies she teaches in her training programs.



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. Josh is a graduate of The University of Georgia and is SHRM-CP certified. Josh enjoys equipping and encouraging bankers to grow their personal skillsets, build strong teams, and create cultures that maximize results for themselves and the banks they serve.

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