

Prospect Bank Trainer Job Description

Job Title: Bank Trainer

Reports To: Director of Human Resources

Prepared By: Administrative Services

Region: Bank Wide

FLSA Status: Exempt

Prepared Date: 05/27/2025

Summary:

The Bank Trainer is responsible for developing and delivering training programs that strengthen employee capability across branch operations, customer service, compliance, and sales. This role ensures that staff understand banking products, regulatory requirements, and internal processes, enabling them to perform confidently and contribute to the bank's strategic goals.

Key Responsibilities:

- Training Design & Development
- Create training programs for branch staff, including tellers, personal bankers, relationship managers, and loan officers.
- Develop materials on banking products (deposits, loans, credit, digital banking), customer service, sales techniques, and operational procedures.
- Build compliance training aligned with regulatory standards.
- Design onboarding programs for new hires, ensuring smooth integration into the bank's culture and systems.
- Produce engaging content: presentations, manuals, e-learning modules, simulations, and job aids.

Training Delivery:

- Facilitate classroom, virtual, and on-the-job training sessions.
- Conduct system training on core banking platforms, CRM tools, and digital channels.
- Coach employees on customer interaction, cross-selling, and problem resolution.
- Support branch readiness for new product launches, system upgrades, or policy changes.

Evaluation & Reporting:

- Assess learner performance through quizzes, role-plays, observations, and feedback surveys.
- Track training attendance, completion rates, and competency outcomes.
- Provide insights to management on skill gaps and training effectiveness.
- Recommend improvements to training programs based on performance data and regulatory updates.

Collaboration & Support:

- Work closely with Leadership, Branch Managers, Compliance, and Project teams to identify training needs.
- Support performance improvement initiatives by coaching employees and teams.
- Participate in audits and ensure training documentation meets regulatory expectations.
- Promote a culture of continuous learning and professional development across branches.

Supervisory Responsibilities: N/A

Qualifications: Bachelor's degree (B. A.) from four-year College or university; or one to two years related experience and/or training; or equivalent combination of education and experience. Preferred to have a strong understanding of retail banking products, compliance requirements, and customer service standards.

Skills & Competencies: Excellent facilitation and presentation skills. Strong communication, coaching, and interpersonal skills. Strong organizational and time-management abilities. Ability to manage multiple training projects across branches.