



Bank Teller Training Checklist

[Your Name]

[Your Company Name]

March 19, 2050

The Bank Teller Training Checklist is a detailed program that prepares our tellers with essential skills for efficient, customer-focused service. It ensures our staff is equipped to handle complex banking tasks and interactions effectively, aiming to foster excellence and enhance our bank's success and reputation.

1. Introduction to Banking Procedures:

- ☐ Provide an overview of basic banking operations and procedures.
- ☐ Emphasize the importance of confidentiality and security.
- ☐ Ensure understanding of compliance with banking regulations.

2. Customer Interaction and Service:

- ☐ Train on effective communication with customers.
- ☐ Emphasize professionalism, courtesy, and a customer-centric approach.
- ☐ Provide scenarios for handling various customer inquiries and issues.

3. Cash Handling and Transaction Procedures:

- ☐ Instruct on accurate counting and verification of currency.
- ☐ Train on processing deposits, withdrawals, and other financial transactions.
- ☐ Emphasize precision in balancing cash drawers.

4. Product Knowledge:

- ☐ Familiarize tellers with the range of banking products and services offered.
- ☐ Provide details on account types, interest rates, and associated fees.
- ☐ Conduct training on cross-selling relevant products.

5. Use of Banking Software and Technology:

- ☐ Provide training on the bank's software systems for transaction processing.
- ☐ Familiarize tellers with online banking tools and mobile applications.

Teller Operations

Siddappa N.Byrareddy



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