

STAFF TRAINING

THE FOUNDATION OF LONG-TERM OVERDRAFT PROGRAM SUCCESS



To deliver a consistent, reliable and compliant overdraft service for your account holders, your team needs to become knowledgeable about all aspects of how it works. With the JMFA OVERDRAFT PRIVILEGE® program, we provide thorough training and support for continued success.

Making training an ongoing process for all involved is the key to a more confident staff, more satisfied account holders and more compliance peace of mind. That's why, in addition to the initial on-site training your team receives upon program implementation, JMFA offers a variety of learning environments and platforms to help you fine-tune your program knowledge and keep your overdraft program running smoothly.

From on-site training and our online learning center to virtual webinars and the JMFA Academy, you can find the best options to fit your specific needs.

THE JMFA OVERDRAFT PRIVILEGE® DIFFERENCE:

- » BETTER SERVICE
- » GREATER EFFICIENCIES
- » GUARANTEED COMPLIANCE
- » IMPROVED PERFORMANCE
- » PRESERVED REVENUE
- » REDUCED RISK

JMFA's training options go beyond teaching your team about the overdraft service and how to use it; they provide the context and perspective needed to see the program from all angles. Employees develop:

- ★ A better understanding of program processes and procedures
- ★ A heightened awareness of ongoing compliance expectations
- ★ A realization of the significance of how their job fits into the big picture of your financial institution's performance and service goals
- ★ An increased confidence in their ability to explain the program to account holders and other employees
- ★ A renewed commitment to continuous improvement

"It was interesting to see [employees] walking out of a JMFA training session after having that 'Aha!' moment. I could see on their faces that it had clicked for them."



JMFA CLIENT TRAINING OPPORTUNITIES

Our comprehensive training events and resources help you take overdraft program management to the next level by enhancing compliance knowledge, streamlining processes and improving service delivery.

ON-SITE

We offer thorough on-site training for your staff to ensure program success. Our experts take your team through all aspects of the program, including effectively communicating the program using compliance best practices, ways to enhance account holder education and satisfaction, and the automation and reporting tools available to create more efficiencies. We're also available to conduct additional on-site training as needed after the program kickoff—it's all part of our comprehensive overdraft consulting.

For more details about our customized training programs, contact your JMFA representative.

WEBINARS

Your staff can also take advantage of our live, virtual training opportunities. All sessions are held during the workweek, so you don't have to slip away from your busy schedule for too long. These convenient online events cover a variety of topics, from workshops to maintain or improve program management, to peer discussion sessions and our viewpoints on regulatory issues and industry trends.

Be sure to check our schedule at jmfa.com/clientevents for the latest webinar dates and times.

ON-DEMAND LEARNING CENTER

To accommodate the need for remote learning, we offer a virtual learning center. You can access a library of training materials that will keep your staff knowledgeable, including program key metrics and how to identify areas for program improvement, communication training, reporting basics and how to streamline processes through automation. These classes can be assigned to new hires and seasoned staff members who would benefit from a refresher course.

For more details, including recommendations based on your project goals, contact your JMFA representative.

JMFA ACADEMY

The JMFA Academy provides a wealth of resources to our clients. Hosted by our highly skilled overdraft program experts, attendees benefit from peer interaction and small group discussions about real-world challenges and strategies. These sessions provide advanced program management and enhanced understanding of key reporting and tracking features, compliance issues and more.

Visit jmfa.com/academy to view and register for our upcoming events.

Whether in person or from the comfort of your office, our training options offer strategies and expertise to help you and your staff run a more efficient, effective and consumer-focused overdraft program.

“The JMFA Academy took the initial on-site training we received when we implemented JMFA OVERDRAFT PRIVILEGE® to the next level. It was a great refresher on the basics and provided additional information about the resources available through Privilege Manager CRM® software that will help us to continually improve our program results.”

JMFA BY THE NUMBERS:

40+
years of
experience

80+
industry
experts working
for you

> 22M
consumers
serviced—and
counting

16
industry
endorsements
and partnerships

2,250+
customized
program
installations

100%
written
compliance
guarantee