

COURSES BY DELIVERY MODALITY



Digital Courses (available through the FINCA Learning Zone)

#	Title	Content	Audience	Duration
1.	Welcome to FINCA Impact Finance	<ul style="list-style-type: none"> • FINCA Impact Finance's Purpose • What is FINCA Impact Finance? • Our Brand Essence and Values • Origins of FINCA • FINCA Milestones Review Activity • Strategy to Succeed • Our Brand Essence and Values in Action 	All staff	1 hour
2.	Leading the Customer Experience	<ul style="list-style-type: none"> • Understanding Customer Experience • Knowing Who Your Customers Are – Internal and External • Living the Brand Essence • Understanding Empathy 	All staff	2 hours
3.	FINCA 2.0: Branch Manager's Guide to FINCA 2.0	<ul style="list-style-type: none"> • Overview of FINCA 2.0 • How BMs can lead and support teams throughout the transformation • FINCA 2.0 elements (Centralized Underwriting, Credit Decisioning, DFA, Call Centers, CRM, Agency Banking, eWallet, Mobile and Internet Banking) 	Managers and supervisors	1 hour
4.	FINCA 2.0: Customer Relationship Officer's Guide to FINCA 2.0	<ul style="list-style-type: none"> • Overview of FINCA 2.0 • How it affects the CRO role • FINCA 2.0 elements (Centralized Underwriting, Credit Decisioning, DFA, Call Centers, CRM, Agency Banking, eWallet, Mobile and Internet Banking) 	Frontliners	1 hour
5.	Change Management	<ul style="list-style-type: none"> • What is Change? • The Change Cycle • Dealing with Resistance • Adapting to Change • Strategies for Dealing with Anger • Managing Stress • Developing a Change Strategy 	Managers and supervisors	1 hour
6.	Harassment & Discrimination Prevention	<ul style="list-style-type: none"> • Reinforcing the importance of warmth, trust, and respect in our office interactions • Identifying harassment, age and racial discrimination • Quid Pro Quo • Preventing Hostile Work Environment Harassment 	All staff	1 hour

7.	Arrears Management	<ul style="list-style-type: none"> Managing a Healthy Portfolio Outstanding Loan Portfolio Report Maintaining a High-Quality Portfolio Portfolio at Risk (PAR), Measuring PAR, Calculating PAR from Day 1 Consequences of Late Payments Arrears – A Monetary Loss to FINCA Benefits of Timely Loan Repayments 	All staff	2 hours
8.	Goal Setting & KPIs	<ul style="list-style-type: none"> FINCA Impact Finance’s Strategy Why Have a Goal? Manager as a Goal Setter Linking KPIs to Performance Areas Driving Goal Achievement Writing SMART Goals Input/Outcome Goals 	Managers and supervisors	1 hour
9.	Giving & Receiving Feedback	<ul style="list-style-type: none"> Importance of Performance Feedback Giving feedback Benefits of giving and receiving feedback “Dos” and “Don’ts” of Giving Feedback BEST – Positive and Developmental Feedbacks Positive and Developmental performance feedback 	All staff	1 hour
10.	Applying the Daily Performance Management Cycle	<ul style="list-style-type: none"> Daily Performance Management Cycle Benefits of applying daily performance management cycle Communicate and Set Standard/Task Train/Demonstrate Observe/Monitor Feedback/Coach Review and Evaluate Formal Disciplinary Process 	Managers and supervisors	1 hour
11.	Performance Reviews at FINCA Impact Finance	<ul style="list-style-type: none"> The Purpose of Performance Appraisal Assessing Performance Opening a Performance review Giving feedback on performance When discussions are difficult Agreeing objectives Personal and Career development 	Managers and supervisors	2 hours
12.	Anti-Money Laundering	<ul style="list-style-type: none"> Money Laundering Sources and Risks Anti-Money Laundering Regulations Know Your Customer Red Flag Categories 	All staff	1 hour

13.	Information Security Awareness Training	<ul style="list-style-type: none"> • Social engineering • Email, phishing and messaging • Social networks • Mobile device security • Data security • Insider threats • Cloud services 	All staff	1 hour
14.	Information Security Awareness Training for new hires	<ul style="list-style-type: none"> • New employee • Browsing safely • Insider Threat • Physical security • Ethics 	All staff	1 hour
15.	Anti-Bribery and Anti-Corruption Best Practices	<ul style="list-style-type: none"> • Basics of the FCPA • Anti-Bribery & Anti-Corruption Provisions • FINCA's Code of Conduct • Misuse of Third-Party Payments • Scenarios of Corrupt Practices in Work-Related Situations 	All staff	0.5 hour
16.	Workplace Coaching	<ul style="list-style-type: none"> • Agreeing on Goals • Using Powerful Coaching Questions • Dealing with Skills Gap • Coaching for Attitude Change 	Managers and supervisors, HR and L&D staff	4 hours
17.	Know Your Customer	<ul style="list-style-type: none"> • Following procedures to manage risks related to customers 	Frontliners, managers and supervisors	1 hour
18.	Diversity and Inclusion (Gender Equality)	<ul style="list-style-type: none"> • Explain the importance of women's financial inclusion to FIF's purpose and operational effectiveness • List the benefits of having more women working in an organization, especially in leadership roles • Name and describe FIF's 5 Gender Diversity Pillars 	All staff	1 hour
19.	FLZ Local Administration	<ul style="list-style-type: none"> • The Role of FLZ Local Admin • FLZ User Administration • Course/Category Management • Resources and Activities – How to Create eCourses in FLZ • FLZ Reporting 	L&D staff	8 hours
20.	How to Navigate FLZ - Video Tutorials	<ul style="list-style-type: none"> • Logging into and Navigating FLZ • Finding a Course using Training Menu • Enrolling in a Course • Navigating an FDA Course 	All staff	1 hour
21.	E-Learning Tool Framework	<ul style="list-style-type: none"> • Moodle: Building a Course on FLZ • PowerPoint: Creating eCourses • Camtasia/PowerDirector: Screen recording, capturing camera, adding titles and transitions • Canva: Image Editing • Articulate Rise/Storyline: Creating eCourses 	L&D staff	10 hours



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1.	Leading Customer Experience from the Inside-Out	<ul style="list-style-type: none"> • Seeing our customers with new eyes • Leading CX through behavior and actions • Creating & inspiring a movement of CX leaders • Subsidiary CX Road Map and CRO 	Managers and supervisors	3 days
2.	We Are the Power – Introducing Customer Experience	<ul style="list-style-type: none"> • Seeing our customers with new eyes • Leading CX through behavior and actions • Understanding the difference between the transactional and relational mindset • Reinforcing brand essence 	Frontliners	1 day
3.	Relational Selling: Building Trusted Relationships to Grow Sales	<ul style="list-style-type: none"> • Actions and behaviors that increase customer outreach and sales and build long-lasting relationships that grow our portfolio and community impact • The customer approach and acquisition process from prospecting to retention • A strong conceptual understanding, conversation tools and techniques to identify good potential customers and convert them to banking with FINCA. 	Frontliners	1 day
4.	People Management 1: Understanding your role as a FINCA supervisor and driving a positive CX environment	<ul style="list-style-type: none"> • The role of FIF supervisor • Managing People’s Performance Everyday/Effective Teams • Five Skills of Positive Communication • Leading Self to Communicate Positively 	Managers and supervisors	3 days
5.	People Management 2: Using Daily Performance Management Practice to Build a High-Performance Workforce	<ul style="list-style-type: none"> • Creating a Positive Performance Management Culture • Giving Performance Feedback in Difficult Situations • Best model • Coaching and the GROW Model 	Managers and supervisors	3 days
6.	Business Performance 1: Getting Business Results	<ul style="list-style-type: none"> • Setting SMART Goals • Quality Drivers and Risk • Critical Role of Compliance • Identifying Fraud and Prevention/Risk Action Planning 	Managers and supervisors	2 days
7.	Business Performance 2: Managing High Performing Branches	<ul style="list-style-type: none"> • Financial Analysis • Strategic Planning • Portfolio Growth and Quality • Manage Risk • HR Strategy (Use feedback and coaching) 	Managers and supervisors	2 days
8.	Effective Coaching & Mentoring	<ul style="list-style-type: none"> • Core skills of an effective coach • Powerful Questioning • Listening • Giving Feedback 	Managers and supervisors, HR and L&D staff	2 days

9.	Developing Teamwork Skills	<ul style="list-style-type: none"> Define the demonstrating teamwork competency and identify the key behaviors associated with it Describe the benefits of effective teamwork and the ways team members or group members contribute to or hinder the practice of teamwork Assess one's skill level in demonstrating teamwork, and identify the behaviors most in need of development Improve one's skills in listening, sharing ideas, giving and receiving feedback, and working through conflict during team and group activities Develop an action plan for transferring skills to the job 	All staff	1 day
10.	Mastering the Write-Off Recovery Call	<ul style="list-style-type: none"> Understand our call center strategy to support the subsidiary's efforts under FINCA 2.0 to increase efficiency and improve financial performance. Name and explain the performance indicators that are relevant to your role and explain the drivers that lead to successful outcomes. Explain the recovery process and the recovery call cycle Use the FINCA brand essence (Warmth, Trust and Responsible Banking) to manage recovery calls in line with our customer experience (CX) standards and proper phone etiquette. Build rapport with write-off customers using listening and questioning. Resolve and reduce the objections of write-off customers. Obtain the customer's promise to pay. 	Recovery Call Center agents	1.5 days
11.	Managing Change and Effective Delegation	<p>Managing Change:</p> <ul style="list-style-type: none"> Describe the forces behind organizational change and the implications for a FINCA subsidiary. Understand the sources of change resistance. Recognize the impact that change has on FINCA employees. Identify the actions that FINCA mid-level managers and staff can take to enable the healthiest response to change. Develop a plan for guiding other FINCA employees through the change. Effectively introduce and lead change. <p>Effective Delegation:</p> <ul style="list-style-type: none"> Differentiate between effective and ineffective delegation. Apply Covey's quadrant for task prioritization. Understand how to monitor the delegation process to ensure success. Assign work and delegate appropriately. 	Managers and supervisors	1 day

12.	Managing Self and Emotional Intelligence	<ul style="list-style-type: none"> Define emotional intelligence and in which way it is related to personal and organizational success. Understand the 5 key competencies that are the basis of emotional intelligence. Apply the Johari Window as a tool that helps them to increase self-awareness. Understand how important it is to control emotions and the main principles to follow in order to take successfully control of one's emotions. Understand in how far auto-motivation plays an important role in managing self within the workplace environment. Describe the main communication skills in order to establish and maintain healthy relations in the workplace. Explain how to recognize emotions in others and how to address them. 	Managers and supervisors	1 day
13.	Instructional Design for Accelerated Learning	<ul style="list-style-type: none"> Accelerated Learning FDA Methodology The Core of FDA F2F Training Multiple Intelligences VAK Intake Styles 	L&D staff	2 days
14.	Facilitator Development	<ul style="list-style-type: none"> What is Facilitation? Accelerated and Inspiring Learning FDA Methodology The Core of FDA F2F Training Facilitate Participant Interactions The Art of Co-Facilitation 	L&D staff, subject matter experts	2 days



Virtual Class Courses

#	Title	Content	Audience	Duration
1.	Basics of eLearning Design and Development	<ul style="list-style-type: none"> Introduction to types of eLearning, terminology and the ADDIE Model Storyboarding for eLearning eLearning authoring tools, and applying PowerPoint to build eLearning Applying Camtasia to build eLearning Implementing eLearning using the FLZ, and evaluating impact 	L&D staff	9 hours
2.	Basics of Virtual Class Design and Facilitation	<ul style="list-style-type: none"> Designing Virtual Class training solutions Use virtual platforms to facilitate engaging instructor-led training Proven techniques for maximizing learner engagement, energy and motivation during a facilitator-led virtual training 	L&D staff	7.5 hours

3.	Basics of Video Production for Job Training	<ul style="list-style-type: none"> • Four Core Video Principles • Video and Learning Principles • Storyboarding and Scripting for Video Production • Using Mobile Devices to Shoot Basic Training Videos 	L&D staff	6 hours
4.	Virtual Workshops: FLZ, PPT, Camtasia, Canva, Articulate Rise & Storyline, PowerDirector, Prezi	<ul style="list-style-type: none"> • Moodle: Building a Course on FLZ • PowerPoint: Creating eCourses • Camtasia/PowerDirector: Screen recording, capturing camera, adding titles and transitions • Canva: Image Editing • Articulate Rise/Storyline: Creating eCourses 	L&D staff	12 hours