



FINCA[®] | Impact
Finance

2024 Course Overview



Dear FINCA Colleague,

You will find in this course overview that FINCA Impact Finance provides you with a range of learning solutions to help you build important leadership, personal effectiveness, business management and relationship skills. Use these learning resources regularly to improve the skills you need to excel in your role at FINCA, and if you have supervision responsibility over other FINCA employees, to become the leader who brings out the best in the people you lead.

For additional information and support regarding your learning and development as an employee of FINCA Impact Finance, please contact the Learning and Development (L&D) team within your subsidiary's Human Resources department. Your HR department works closely with the Global L&D team under Global HR. We are here to support your learning and professional growth.

Happy Learning,
Learning & Development Team

COURSES BY DELIVERY MODALITY

 **Digital Courses** {Check out digital learnings in your Training menu}

| # | Title (published) | Content/Learning objectives | Audience | Duration |
|----|---|--|-----------------------------------|----------|
| 1. | How to Navigate FLZ - Video Tutorials (09/2016) | <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 |
| 2. | Information Security Awareness Training (10/2016) | <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 |
| 3. | FLZ Local Administration (10/2016) | <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 |
| 4. | Know Your Customer (04/2017) | <ul style="list-style-type: none"> Following procedures to manage risks related to customers | Frontliners, managers/supervisors | 1 hour |
| 5. | Anti-Money Laundering (06/2017) | <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 |

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| 6. | Harassment & Discrimination Prevention (08/2017) | <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. | Leading the Customer Experience (09/2017) | <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 |
| 8. | E-Learning Tool Framework (03/2018) | <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 |
| 9. | Welcome to FINCA Impact Finance (09/2018) | <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 |
| 10. | FINCA 2.0: Branch Manager's Guide to FINCA 2.0 (11/2018) | <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/ supervisors | 1 hour |
| 11. | FINCA 2.0: Customer Relationship Officer's Guide to FINCA 2.0 (11/2018) | <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 |

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| 12. Change Management (11/2018) | <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/ supervisors | 1 hour |
| 13. Arrears Management (12/2018) | <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 |
| 14. Goal Setting & KPIs (03/2019) | <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/ supervisors | 1 hour |
| 15. Giving & Receiving Feedback (03/2019) | <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 |

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| 16. | Applying the Daily Performance Management Cycle (03/2019) | <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/ supervisors | 1 hour |
| 17. | Performance Reviews at FINCA Impact Finance (03/2019) | <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/ supervisors | 2 hours |
| 18. | Information Security Awareness Training for new hires (05/2019) | <ul style="list-style-type: none"> • New employee • Browsing safely • Insider Threat • Physical security • Ethics | All staff | 1 hour |
| 19. | Workplace Coaching (06/2019) | <ul style="list-style-type: none"> • Agreeing on Goals • Using Powerful Coaching Questions • Dealing with Skills Gap • Coaching for Attitude Change | Managers/ supervisors, L&D staff | 4 hours |
| 20. | Diversity & Inclusion: Gender Equality (11/2019) | <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 |
| 21. | COVID-19: What You Need to Know (04/2020) | <ul style="list-style-type: none"> • In-depth look at what a coronavirus is and what makes COVID-19 unique. • How the disease spreads, what symptoms to watch out for, and how to prepare with prevention and proper response strategies. | All staff | 0.5 hour |

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| <p>22. Mastering the Arrears Collections Call during the COVID-19 Crisis (05/2020)</p> | <ul style="list-style-type: none"> • Adopt a positive outlook despite challenges and how to minimize the risk of coronavirus infection to support your clients • Apply a step-by-step approach to arrears collections and obtain a Promise-to-Pay (PTP) • Better navigate objections you will frequently hear from customers whose business activities have been impacted by the COVID-19 crisis • Be equipped with relevant tips and performance-tools that will help you to achieve high performance • Apply active listening to establish positive relationship with the customers, and demonstrate how to apply powerful questioning technique to obtain a Promise-to-Pay (PTP) • Use assertive behavior to negotiate with the client successfully to secure a Promise-to-Pay (PTP) that leads to the arrears repayment • And most importantly, demonstrate FINCA Customer Experience, empathy and emotional balance during the arrears collection calls. | | <p>4 hours</p> |
| <p>23. Anti-Bribery and Anti-Corruption Best Practices (11/2020)</p> | <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 | <p>All staff</p> | <p>0.5 hour</p> |

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| 24. Uncovering and Mitigating Unconscious Bias (03/2021) | <ul style="list-style-type: none"> • The benefits of a diverse and inclusive workplace • The reasons why employees might feel excluded • Some basic steps we can take to help everyone feel included at FIF • The benefits of a diverse clientele • Underrepresented groups in your client base • Services and strategies to attract new clients from underrepresented groups • Treating all clients with respect and deliver exceptional customer service • Barriers that might prevent certain clients from accessing FIF's services • The impact of unconscious bias in our interactions with clients | All staff, M5 for Managers/ Supervisors | 1 hour |
| 25. Anti-Money Laundering and Combating the Financing Terrorism (12/2021) | <ul style="list-style-type: none"> • What Anti-Money Laundering and Combating the Financing of Terrorism is, and why it is relevant for FINCA Impact Finance (FIF) • The signs that indicate a case of Money Laundering and Terrorist Financing could be occurring in FIF • How to act upon the identified red flags of Money Laundering and Terrorist Financing to protect FIF from potential damage | All staff | 1 hour |
| 26. Fostering Financial Health (03/2022) | <ul style="list-style-type: none"> • How to improve your personal and your clients' financial health • What we do to support clients and specifically, women, through a conversation about their financial health • How to set up financial goals, what steps to develop a budget • How to leverage FIF products to build emergency savings • How to manage credit and debt responsibly | All staff | 1 hour |
| 27. Creating a culture of Diversity, Inclusion and Belonging at FINCA Impact Finance (03/2023) | <ul style="list-style-type: none"> • How to be a workplace where talented people from all groups want to work for, and all types of clients and investors want to do business with – demonstrating DIB values for FIF customers and colleagues • How to provide an environment where anyone, no matter their background, can thrive and grow professionally | All staff | 1 hour |

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| 28. | Introduction to Subsidiary Policy Manual of FINCA Impact Finance (08/2023) | <ul style="list-style-type: none"> • Get understanding on FINCA Impact Finance’s Subsidiary Policy Manual (SPM) provides an overview of FINCA Impact Finance’s Subsidiary Policy Manual (SPM), FINCA Impact Finance’s mission and purpose, guiding principles and organizational and management structure | All staff | 1 hour |
| 29. | Improving Emotional Intelligence (10/2023) | <ul style="list-style-type: none"> • How to be a leader in providing exceptional customer experiences • How to equip you with the skills, strategies, and knowledge needed to strengthen our CX culture through our FIF brand essence Warmth, Trust and Responsible banking | All staff | 2 hours |



In-Person Courses

| # | Title (published) | Content | Audience | Duration |
|----|--|---|--------------------------|----------|
| 1. | Managing Change and Effective Delegation (06/2013) | <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 |

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| 2. | Managing Self and Emotional Intelligence (06/2013) | <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 |
| 3. | Leading Customer Experience from the Inside-Out (05/2015) | <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 |
| 4. | Facilitator Development (05/2015) | <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 |
| 5. | People Management 1: Understanding your role as a FINCA supervisor and driving a positive CX environment (09/2015) | <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 |
| 6. | We Are the Power – Introducing Customer Experience (02/2016) | <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 |

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| 7. | Effective Coaching & Mentoring (04/2017) | <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 |
| 8. | Instructional Design for Accelerated Learning (04/2017) | <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 |
| 9. | Business Performance 1: Getting Business Results (06/2017) | <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 |
| 10. | People Management 2: Using Daily Performance Management Practice to Build a High-Performance Workforce (07/2017) | <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 |
| 11. | Developing Teamwork Skills (03/2019) | <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 |

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| <p>12. Mastering the Write-Off Recovery Call (03/2019)</p> | <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. | <p>Recovery Call Center agents</p> | <p>1.5 days</p> |
| <p>13. Relational Selling: Building Trusted Relationships to Grow Sales (04/2019)</p> | <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. | <p>Frontliners</p> | <p>1 day</p> |



Virtual Class Courses

| # | Title (published) | Content | Audience | Duration |
|----|---|--|-----------|-----------|
| 1. | Basics of eLearning Design and Development (01/2017) | <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 (05/2017) | <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 (10/2017) | <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 (03/2018) | <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 |