2019 Course Overview

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## Courses by Delivery Modality

**Digital Courses** *(available through the FINCA Learning Zone)*

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Content</th>
<th>Audience</th>
<th>Duration</th>
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<tbody>
<tr>
<td>1.</td>
<td>Welcome to FINCA Impact Finance</td>
<td>• FINCA Impact Finance's Purpose&lt;br&gt;• What is FINCA Impact Finance?&lt;br&gt;• Our Brand Essence and Values&lt;br&gt;• Origins of FINCA&lt;br&gt;• FINCA Milestones Review Activity&lt;br&gt;• Strategy to Succeed&lt;br&gt;• Our Brand Essence and Values in Action</td>
<td>All staff</td>
<td>1 hour</td>
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<td>2.</td>
<td>Leading the Customer Experience</td>
<td>• Understanding Customer Experience&lt;br&gt;• Knowing Who Your Customers Are – Internal and External&lt;br&gt;• Living the Brand Essence&lt;br&gt;• Understanding Empathy</td>
<td>All staff</td>
<td>2 hours</td>
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<td>3.</td>
<td>FINCA 2.0: Branch Manager's Guide to FINCA 2.0</td>
<td>• Overview of FINCA 2.0&lt;br&gt;• How BMs can lead and support teams throughout the transformation&lt;br&gt;• FINCA 2.0 elements (Centralized Underwriting, Credit Decisioning, DFA, Call Centers, CRM, Agency Banking, eWallet, Mobile and Internet Banking)</td>
<td>Managers and supervisors</td>
<td>1 hour</td>
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<td>4.</td>
<td>FINCA 2.0: Customer Relationship Officer's Guide to FINCA 2.0</td>
<td>• Overview of FINCA 2.0&lt;br&gt;• How it affects the CRO role&lt;br&gt;• FINCA 2.0 elements (Centralized Underwriting, Credit Decisioning, DFA, Call Centers, CRM, Agency Banking, eWallet, Mobile and Internet Banking)</td>
<td>Frontliners</td>
<td>1 hour</td>
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<td>5.</td>
<td>Change Management</td>
<td>• What is Change?&lt;br&gt;• The Change Cycle&lt;br&gt;• Dealing with Resistance&lt;br&gt;• Adapting to Change&lt;br&gt;• Strategies for Dealing with Anger&lt;br&gt;• Managing Stress&lt;br&gt;• Developing a Change Strategy</td>
<td>Managers and supervisors</td>
<td>1 hour</td>
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<td>6.</td>
<td>Harassment &amp; Discrimination Prevention</td>
<td>• Reinforcing the importance of warmth, trust, and respect in our office interactions&lt;br&gt;• Identifying harassment, age and racial discrimination&lt;br&gt;• Quid Pro Quo&lt;br&gt;• Preventing Hostile Work Environment Harassment</td>
<td>All staff</td>
<td>1 hour</td>
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<td>Course</td>
<td>Topics</td>
<td>Audience</td>
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| 7. Arrears Management                                               | • 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                                              | • 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                                      | • 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                 | • 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                      | • 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                                           | • Money Laundering Sources and Risks  
• Anti-Money Laundering Regulations  
• Know Your Customer  
• Red Flag Categories                                                     | All staff          | 1 hour    |
| 13. | Information Security Awareness Training | • 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 | • New employee  
• Browsing safely  
• Insider Threat  
• Physical security  
• Ethics | All staff | 1 hour |
| 15. | Anti-Bribery and Anti-Corruption Best Practices | • 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 | • 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 | • Following procedures to manage risks related to customers | Frontliners, managers and supervisors | 1 hour |
| 18. | Diversity and Inclusion (Gender Equality) | • Explain the importance of women’s financial inclusion to FIP’s purpose and operational effectiveness  
• List the benefits of having more women working in an organization, especially in leadership roles  
• Name and describe FIP’s 5 Gender Diversity Pillars | All staff | 1 hour |
| 19. | FLZ Local Administration | • 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 | • 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 | • 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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<tbody>
<tr>
<td>1.</td>
<td>Leading Customer Experience from the Inside-Out</td>
<td>• Seeing our customers with new eyes</td>
<td>Managers and supervisors</td>
<td>3 days</td>
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<td>• Leading CX through behavior and actions</td>
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<td>• Creating &amp; inspiring a movement of CX leaders</td>
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<td>• Subsidiary CX Road Map and CRO</td>
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<td>2.</td>
<td>We Are the Power – Introducing Customer Experience</td>
<td>• Seeing our customers with new eyes</td>
<td>Frontliners</td>
<td>1 day</td>
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<td>• Leading CX through behavior and actions</td>
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<td>• Understanding the difference between the transactional and relational mindset</td>
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<td>• Reinforcing brand essence</td>
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<td>3.</td>
<td>Relational Selling: Building Trusted Relationships to Grow Sales</td>
<td>• Actions and behaviors that increase customer outreach and sales and build long-lasting relationships that grow our portfolio and community impact</td>
<td>Frontliners</td>
<td>1 day</td>
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<td>• The customer approach and acquisition process from prospecting to retention</td>
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<td>• A strong conceptual understanding, conversation tools and techniques to identify good potential customers and convert them to banking with FINCA.</td>
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<td>4.</td>
<td>People Management 1: Understanding your role as a FINCA supervisor and driving a positive CX environment</td>
<td>• The role of FIF supervisor</td>
<td>Managers and supervisors</td>
<td>3 days</td>
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<td>• Managing People’s Performance Everyday/Effective Teams</td>
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<td>• Five Skills of Positive Communication</td>
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<td>• Leading Self to Communicate Positively</td>
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<td>5.</td>
<td>People Management 2: Using Daily Performance Management Practice to Build a High-Performance Workforce</td>
<td>• Creating a Positive Performance Management Culture</td>
<td>Managers and supervisors</td>
<td>3 days</td>
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<td>• Giving Performance Feedback in Difficult Situations</td>
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<td>• Best model</td>
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<td>• Coaching and the GROW Model</td>
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<td>6.</td>
<td>Business Performance 1: Getting Business Results</td>
<td>• Setting SMART Goals</td>
<td>Managers and supervisors</td>
<td>2 days</td>
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<td>• Quality Drivers and Risk</td>
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<td>• Critical Role of Compliance</td>
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<td>• Identifying Fraud and Prevention/Risk Action Planning</td>
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<td>7.</td>
<td>Business Performance 2: Managing High Performing Branches</td>
<td>• Financial Analysis</td>
<td>Managers and supervisors</td>
<td>2 days</td>
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<td>• Strategic Planning</td>
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<td>• Portfolio Growth and Quality</td>
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<td>• Manage Risk</td>
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<td>• HR Strategy (Use feedback and coaching)</td>
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<td>8.</td>
<td>Effective Coaching &amp; Mentoring</td>
<td>• Core skills of an effective coach</td>
<td>Managers and supervisors, HR and L&amp;D staff</td>
<td>2 days</td>
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<td>• Powerful Questioning</td>
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<td>• Listening</td>
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<td>• Giving Feedback</td>
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| 9. Developing Teamwork Skills | • 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 | • 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 | Managing Change:  
• 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.  
Effective Delegation:  
• 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
   - 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.

13. Instructional Design for Accelerated Learning
   - Accelerated Learning
   - FDA Methodology
   - The Core of FDA F2F Training
   - Multiple Intelligences
   - VAK Intake Styles

14. Facilitator Development
   - What is Facilitation?
   - Accelerated and Inspiring Learning
   - FDA Methodology
   - The Core of FDA F2F Training
   - Facilitate Participant Interactions
   - The Art of Co-Facilitation

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### Virtual Class Courses

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<tr>
<th>#</th>
<th>Title</th>
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<tbody>
<tr>
<td>1.</td>
<td>Basics of eLearning Design and Development</td>
<td>• Introduction to types of eLearning, terminology and the ADDIE Model</td>
<td>L&amp;D staff</td>
<td>9 hours</td>
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<td>• Storyboarding for eLearning</td>
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<td>• eLearning authoring tools, and applying PowerPoint to build eLearning</td>
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<td>• Applying Camtasia to build eLearning</td>
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<td>• Implementing eLearning using the FLZ, and evaluating impact</td>
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<td>2.</td>
<td>Basics of Virtual Class Design and Facilitation</td>
<td>• Designing Virtual Class training solutions</td>
<td>L&amp;D staff</td>
<td>7.5 hours</td>
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<td>• Use virtual platforms to facilitate engaging instructor-led training</td>
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<td>• Proven techniques for maximizing learner engagement, energy and motivation during a facilitator-led virtual training</td>
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|   | Basics of Video Production for Job Training | • 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 |  
|   | Virtual Workshops: FLZ, PPT, Camtasia, Canva, Articulate Rise & Storyline, PowerDirector, Prezi | • 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  
|   | 12 hours |