

# Learning Plans

## Credit union-specific learning plans guide your career path

Choose one of these credit union positions that fits your educational needs:

- Accounting Clerk
- Branch Manager
- Collector
- Compliance Officer
- Loan Officer, Loan Processor, or VP Lending
- Marketing Manager
- Member Service Representative
- New Employee Orientation
- Teller, Head Teller, or Teller Manager

Start with the core competency courses which provide the base for your learning adventure. Continue your professional development with the specialized courses specific to each position. The completion of a learning plan ensures you have the skill set and knowledge to succeed. Be sure to check out the recognition options. Many courses offer certificates, designations, or college credit to document your educational experience.

### CORE COMPETENCY COURSES

Course Title	Online	Print	Course Title	Online	Print
<b>BANKRUPTCY</b>			<b>MARKETING</b>		
<input type="checkbox"/> Bankruptcy and Court Proceedings		\$400	<input type="checkbox"/> Developing Retail Marketing		M28
<b>OR</b>			<b>MEMBER SERVICES AND ACCOUNTS</b>		
<input type="checkbox"/> Bankruptcy	A1006		<input type="checkbox"/> Member Relations	\$20	\$20
<b>COMPLIANCE</b>			<input type="checkbox"/> Money and Negotiable Instruments	\$100	\$100
<input type="checkbox"/> RegTraC Level 1, Module 2		22691	<input type="checkbox"/> Member Services	\$110	\$110
<b>OR</b>			<input type="checkbox"/> Opening New Accounts	\$800	\$800
<input type="checkbox"/> Bank Bribery Act	R102D		<input type="checkbox"/> Professional Member Service	A1005	SI308
<input type="checkbox"/> Bank Secrecy Act	R102A		<b>SALES</b>		
<input type="checkbox"/> NCUA Privacy Regulation	R102H		<input type="checkbox"/> Credit Union Sales	A1002	SI305
<input type="checkbox"/> OFAC - Office of Foreign Assets Control	R102B		<input type="checkbox"/> Cross-Selling	SI20	SI20
<input type="checkbox"/> RegTraC Level 1, Module 3		22692	<input type="checkbox"/> Improving and Maintaining Quality Service	\$500	\$500
<b>OR</b>			<input type="checkbox"/> Leading and Managing Credit Union Sales		M16
<input type="checkbox"/> Reg B - Equal Credit Opportunity Act	R103F		<input type="checkbox"/> Managing Financial Education Programs		M30
<b>CREDIT UNION ORIENTATION</b>			<b>SECURITY</b>		
<input type="checkbox"/> Introduction to Credit Unions	A1004	SI304	<input type="checkbox"/> Online Security		M36
<b>HR STAFFING AND THE LAW</b>			<input type="checkbox"/> Preventing Fraud	\$900	\$900
<input type="checkbox"/> Employment Law and Preventing Sexual Harassment	M13	M13	<input type="checkbox"/> Recognizing Emerging Fraudulent Practices	A1015	SI1317
<input type="checkbox"/> Workplace Diversity	M12	M12	<input type="checkbox"/> Robbery Prevention and Preparation	SI320	SI320
<b>INTERPERSONAL SKILLS AND CAREER BUILDING</b>			<input type="checkbox"/> Security	S30	S30
<input type="checkbox"/> Business Communication Skills	A1003	M37	<input type="checkbox"/> Security Administration		M24
<input type="checkbox"/> Communications and Telephone Skills	SI303	SI303	<input type="checkbox"/> Security Issues	\$910	\$910
<input type="checkbox"/> Develop a Career Plan	SI000	SI000	<input type="checkbox"/> Security Procedure Protocol	A1008	SI309
<input type="checkbox"/> Helping Members Understand and Solve Problems	SI110	SI110	<b>TECHNOLOGY</b>		
<input type="checkbox"/> Interpersonal Skills: Understanding Your Effect on Others	M15	M15	<input type="checkbox"/> Credit Union Technology	\$600	\$600
<input type="checkbox"/> Make Work Manageable	SI020	SI020	<input type="checkbox"/> Managing Technology		M20
<input type="checkbox"/> Write Effectively	SI010	SI010	<input type="checkbox"/> Serving Members with Technology	\$620	\$620
<b>MANAGEMENT SKILLS AND MANAGING EMPLOYEE PERFORMANCE</b>			<input type="checkbox"/> The Critical Role of Technology in Credit Unions	A1009	\$630
<input type="checkbox"/> Resolving Employee Conflict	A1016	M38	<input type="checkbox"/> Using Technology to Improve Member Service	SI120	SI120
<b>OR</b>					
<input type="checkbox"/> Managing Conflict	M14				

Editions and formats are updated frequently. Visit [training.cuna.org](http://training.cuna.org) for the most current information.



Credit Union National Association