



# Becoming a Banker Presentation Information

## OVERVIEW

During this presentation, you will introduce students to the many careers in the banking sector, talking with them about six distinct career paths. Students will learn: why each job is important, challenges of the job, how careers within the banking industry call upon a variety of skills beyond just an affinity for finance, and will be able to relate these opportunities back to their own interests. At the end, students will have the opportunity to formulate interview questions.

## OBJECTIVES

Students will:

- Learn the numerous career options available as a banker, from those that involve working closely with people, to those that involve managing technology or working with businesses in the community.
- Understand that all career options combine to form the body of the banking business, and all are important.
- Identify personality traits, skills, high school courses and extracurricular activities that prepare them for a banking career.
- Explain how bankers help communities and families, and why becoming a banker can be a good career choice.

## MATERIALS

Lesson plan/script for a 45-minute presentation

Becoming a Banker PowerPoint Presentation

Student Tip Sheets (make sufficient copies for entire class)

1. Careers in Banking
2. Interview With a Banker



## PRESENTATION STEPS

### Introduction

**Have welcome slide on display.** Say, “Hello. My name is /Ms./Mrs.\_\_\_\_\_.” (Don’t use your first name. Students are used to addressing adults in school as Mr., Ms., or Mrs.)

Explain that you are from (Bank Name) and you’re there to talk about the diverse career opportunities in the banking industry.

Start by asking the students, “Have you ever been inside a bank, either by yourself or with a family member? If so, please raise your hand.” (Most, if not all, students should raise their hands.)

**Display Slide 2** Ask students, “What are some of the things you have done or could do at a bank?” Allow some of the students to share. Select individuals from different parts of the room, and thank them for sharing.

**Display Slide 3** Tell students that today you will introduce them to different career opportunities in banking that go well beyond the bank transactions with which they may be familiar. In fact, bankers play a very important role in their communities and banking is a great industry in which to pursue a career.

Say, “The banking industry employs people in many of the same types of jobs that other businesses do. Most of the people you see when you visit a bank work in what we call branch operations, but there are many other banking professionals working ‘behind the scenes’ in areas like human resources, information systems, marketing, public relations and community outreach. Much how your body uses different parts to complete different daily functions, the banking industry is made up of people who complete different tasks that make the bank function. These jobs require a variety of skills, so you can see a bank needs people with all kinds of talents and education to ensure the bank runs smoothly each day. Depending on your interests and your skill set, you can find a fulfilling career in banking.”

Say, “Bankers can serve on school boards, provide loans to help establish or grow small businesses, advise companies and local organizations on how best to manage and grow their assets, sponsor local events, and support local schools. Regardless of the role bankers play, wanting to work with and help people succeed is an important trait all bankers should have.”

### Discussion

**Display Slide 4** Tell the students believe it or not they are or could be taking steps towards beginning a career in the banking industry by the personality traits and skills they already possess, in addition to the courses they are currently enrolled in and their participation in extracurricular activities.

Distribute a “Careers in Banking” Student Activity Sheet to each student. Tell students as you



discuss each career category as a class they should complete that category section of the activity sheet. Students should complete each section thinking about the skills and interests they currently have that would help position them for a job in that field. Additionally the students should list the types of educational courses and qualifications they think would help them succeed in each career category.

Say, “Let’s take a closer look at the various career categories that make the bank function, starting with those professionals in branch operations, which are similar to the face of the bank as these are the bankers who interact with customers.”

Say, “I expect that some of you may prefer working face-to-face with customers, rather than sitting behind a computer screen or spending time in meetings. And some of you may prefer the ‘behind the scenes’ work more. But, if you’re a people person, branch operations could be for you. These roles come with a lot of satisfaction from helping someone achieve their dream of owning a home, or even opening their first savings account.”

Give examples of specific branch operation jobs at your bank and what each position is responsible for, such as:

- Bank Tellers – First person the customer sees and the first employee to offer help to the customer as well. They open accounts, set up safe-deposit boxes, and handle withdrawals and deposits on a daily basis.
- Loan Officer – Helps clients (both individuals and businesses) get loans. Also tasked with staying on top of new laws and regulations that affect the bank’s ability to lend money.

Tell the students that there are certain personality traits and skills that make a person a good fit for a job. The difference between the two are that personality traits are patterns in your behavior, temperament and emotion. Skills are things you can develop, gain and learn that help you carry out specific tasks.

Ask “What are some of the personality traits and skills that would make someone a good fit for branch operations?” As students discuss personality traits and skills remind them to note their own traits and skills on the “Careers in Banking” Student Activity Sheet.

Ask “What classes do you currently take or in what activities do you participate that could prepare you for a banking career?” Have students raise their hands to offer ideas. Call on individual students and draw them out as appropriate to help them clarify and develop their ideas. Responses may include:

- Business class – Gives understanding of business management functions and the basic organization of a business.
- Language/Culture class – Helps understand different learned behaviors, values and beliefs.

#### NOTE

**Personality Traits, Skills, Education and Extracurricular traits listed on Slides 4-9 are only examples.**

Encourage students to come up with additional options not listed on the slides and have them make the connection between their ideas and the career category.



- Math class – Numbers are the foundation of the banking industry.
- Club treasurer – Gives experience working with numbers.
- Peer mediator – Develops skills to work with other to resolve conflict and solve problems.
- Sports – Exposure to being flexible and working together as a team.

Remind the students they should note answers that pertain to them on their “Careers in Banking” Student Activity Sheet as the class discusses each career category. Encourage student discussion by asking others what they wrote on their sheet. Make sure to connect the student’s current interests and activities to a possible career in banking.

Say, “Now that we know what it takes to succeed in branch operations, let me ask: Does a career in branch operations sound interesting to any of you? Raise your hand if you think you’d fit into branch operations.”

Tell students, “If you didn’t raise your hand, don’t worry. There are many other career options in banking we will discuss today.”

**Display Slide 5** Say, “The next career category we will look at is Human Resources. Much how your heart ensures your body functions by circulating vital nutrients throughout the body, those working in the HR field make certain the bank functions by placing staff in job positions and making sure employees are compensated.”

Give examples of specific human resource jobs at your bank and what each position handles day to day. Such as:

- Human Resource Officer – Develops job descriptions, recruits and selects new employees, as well as helps decide who gets promotions or job assignment changes.
- Benefits Specialists – Manages employee compensation guidelines, ensuring all employees are compensated and understand their benefits.

Lead students through a discussion of personality traits, skills, education and extracurricular activities specific to Human Resources. Remind students to note answers that apply to them on their activity sheet. Responses may include:

- English class – Strong written and verbal communication is necessary for most every professional job. Particularly when communicating with an external audience.
- Family and Consumer Science class – Multi-discipline (business, social, economic and political) knowledge to achieve optimal and sustainable living for individuals, families and communities.
- Foreign Language class – Helps foster diversity in the bank, which helps the bank serve diverse communities.
- Student Government – Builds leadership and decision making skills.
- Volunteer activities – Gives a sense of ownership of actions and helps to prioritize responsibilities.
- Community clubs – Opportunity to be a part of the greater community outside of school activities. Builds personal development skills.



**Display Slide 6** Say, “I probably don’t even have to ask how many of you enjoy working with technology. Reports estimate teens like you spend an average of nine hours a day using smartphones, tablets and computers. If you enjoy working with technology, a banking career in information systems or information technology (IT) could be right for you.”

Give examples of specific IT jobs at your bank and what each position is responsible for. Such as:

- Information Systems – Maintains the bank’s digital records, as well as streamlines data input.
- Digital Product Development Manager – Responsible for providing digital solutions to meet consumer needs. Bankers in this role also drive account and application growth through online, tablet and mobile channels.

Say, “IT is the brains behind the business, controlling the bank’s ability to interpret information and function in a rapidly evolving world of technology. It takes a team of IT specialists, web administrators, software developers and others to make sure everything runs smoothly and securely and that the digital needs of customers are met.”

Lead students through discussion of their personality traits, skills, education and extracurricular activities that relate to IT. Responses may include:

- Computer Science class – Basis to learn data manipulation and algorithms to produce software programs.
- Math class – Numbers are the foundation of the banking industry.
- Visual Arts class – Familiarity with concepts used in graphic design and video art that can be incorporated into websites.
- Computer Organizations – Additional opportunities to fine tune problem-solving skills.
- Social Media Support – Opportunity to understand and keep up with the latest digital platforms.
- STEM Clubs – Expands on Science Technology Engineering and Math (STEM) skills through hands-on opportunities and fieldtrips.

**Display Slide 7** Say, “Each of you has an individual psyche or soul that makes you unique, and banks rely on individuals with strong communication skills and creativity to fill marketing positions that make the bank’s message and brand distinctive and original to help their business stand out to consumers.”

Give examples of specific marketing jobs at your bank and the details of each position. Such as:

- Advertising Coordinator – Creates ads and brochures, keeping up with what the competition is doing. They also analyze how to appeal to the challenges offered by new markets, like younger customers and customers who prefer digital banking.
- Marketing Director – Develops short- and long-term strategies to promote the bank’s services and give the bank a cohesive brand, based on current trends in the industry.

Lead students through discussion of their personality traits, skills, education and extracurricular activities specific to Marketing. Responses may include:

- Business class – Gives understanding of business management functions and the basic organization of a business.



- Family and Consumer Science class – Multi-discipline (business, social, economic and political) knowledge to achieve optimal and sustainable living for individuals, families and communities.
- Visual Arts class – Familiarity with concepts used in printmaking, photography, graphic design and video art.
- Theater – Improves public speaking and presentation skills.
- School publications – Familiarizes students with design and print layouts, as well as advertising.
- Art-Focused clubs – Fosters creativity and expression.

**Display Slide 8** Say, “Public Relations requires personality traits and skills that are similar to marketing. However, instead of helping the bank attract new customers, public relations professionals act as the bank’s voice, focusing on telling the bank’s story through the media and face-to-face in the community. Bankers in this role act as a spokesperson for bank through traditional media outlets and social media.”

Give examples of specific PR jobs at your bank and what each position is responsible for. Such as:

- Media Relations Officer – Works closely with the marketing department to build a positive reputation for the bank in the community it serves.
- PR Director – Writes speeches, responds to interview requests, meets with the media, and communicates with bank’s senior management, shareholders and the community.

Lead students through discussion of their personality traits, skills, education and extracurricular activities specific to PR. Responses may include:

- English class – Strong written and verbal communication is necessary to the majority of professional jobs. Particularly when communicating with an external audience.
- History/Social Science class – Explores human experience locally and globally.
- Performing Arts class – Engages artistic perception, creative expression, historical and cultural content.
- Public Speaking – Helps build confidence to articulately convey thoughts to large groups.
- School Publications and Media Clubs – Improves writing and editing abilities.
- Political/Civic Engagement – Develops knowledge and skills by incorporating students into the larger social fabric of local, national or global communities.

**Display Slide 9** Say, “A bank is only as strong as the community it serves, and that’s why most banks have professionals, acting as the hands and feet of the bank, who go out into the community to find ways to better the community.”

Give examples of specific Community Outreach jobs at your bank and what their roles entail. Such as:

- Community Reinvestment Officer – Help to ensure that community members have the funds needed to make their businesses and lives more financially secure.
- Social Responsibility Manager – Raises awareness to the bank’s commitment to diversity, community and financial education activities.



Lead students through discussion of their personality traits, skills, education, and extracurricular activities specific to Community Outreach. Responses may include:

- Business class – Gives understanding of business management functions and the basic organization of a business.
- Family and Consumer Science class – Multi-discipline (business, social, economic and political) knowledge to achieve optimal and sustainable living for individuals, families and communities.
- Performing Arts class – Engages artistic perception, creative expression, historical and cultural content.
- Sports – Exposure to being flexible and working together as a team.
- Social Activism – Willingness to motivate change increases ones monitoring and self-motivation skills while inspiring others.
- Community Volunteer groups – Opportunity to be a part of the greater community outside of school activities. Builds interpersonal skills.

### Activity

**Display Slide 10** Distribute “Interview With a Banker” Student Activity Sheet to each student.

Say: “Now that you know about some of the different careers within banking, imagine you’ve applied for a position at the bank and have been called back for an in person interview. Using the “Interview With a Banker” Student Activity Sheet to prepare for your big interview, come up with some ideas of questions you think you will be asked. Also, what are some questions you want to ask the person who is interviewing you?”

Allow time for all students to complete the activity sheet.

Once students have completed the activity sheet give them the opportunity to brush up on their communication skills by holding mock interviews. These interviews can be between you and one student or you can have the students work in pairs.

### CLOSURE

Ask students to raise their hands if they learned something new about banking today. Remind students that there are numerous career options as a banker and that together, all of the career categories form the body of the banking business, and each are equally as important. Encourage students to look into additional banking career options not discussed during today’s presentation.

Thank the students and teacher for letting you come to their class and for being such an engaged audience. Tell them that you hope to see some of them working in a bank someday, perhaps even as one of your colleagues.

### NOTE

If time allows, see if the student “customers” can “stump” the banker by presenting an unusual task or situation. For example, the customer just won the lottery and wants to open a low-interest savings account rather than investing the funds. The banker has to let the customer know why the savings account might not be the best place to put a million dollars. The more creative, the better!

## Careers in Banking

Name \_\_\_\_\_

**Directions:** For each of the banking career categories described below, list the skills and interests *you already possess* that could help position you for a job in that field. Also list the educational courses and extracurricular activities you are currently enrolled in that could help you succeed in a banking career.

### BRANCH OPERATIONS

Bank tellers and loan officers are on the front lines when it comes to banking, assisting the bank's customers when they come to the bank.

Your Skills/Interests: \_\_\_\_\_

\_\_\_\_\_

Current Educational Courses/  
Extracurricular Activities: \_\_\_\_\_

\_\_\_\_\_

### MARKETING

Trust is a vital part of helping others. Marketing professionals promote the bank's services as helpful, trustworthy, and important.

Your Skills/Interests: \_\_\_\_\_

\_\_\_\_\_

Current Educational Courses/  
Extracurricular Activities: \_\_\_\_\_

\_\_\_\_\_

### HUMAN RESOURCES

Providing banking services that support a community means you need to have great people on your team. That's where human resources professionals come in.

Your Skills/Interests: \_\_\_\_\_

\_\_\_\_\_

Current Educational Courses/  
Extracurricular Activities: \_\_\_\_\_

\_\_\_\_\_

### PUBLIC RELATIONS

Getting the word out that your bank has the services needed to help make the community a better place to live is the role of public relations professionals.

Your Skills/Interests: \_\_\_\_\_

\_\_\_\_\_

Current Educational Courses/  
Extracurricular Activities: \_\_\_\_\_

\_\_\_\_\_

### INFORMATION SYSTEMS

Providing top-tier banking services means that data needs to be organized and accessed in ways that benefit both the banking system and its customers.

Your Skills/Interests: \_\_\_\_\_

\_\_\_\_\_

Current Educational Courses/  
Extracurricular Activities: \_\_\_\_\_

\_\_\_\_\_

### COMMUNITY OUTREACH

Building a stronger community by providing funds for those who need the most help and raising awareness as to how the bank invests in the community.

Your Skills/Interests: \_\_\_\_\_

\_\_\_\_\_

Current Educational Courses/  
Extracurricular Activities: \_\_\_\_\_

\_\_\_\_\_



### Interview With a Banker

Name \_\_\_\_\_

**Directions:** Reflecting on the knowledge you've gained from the presentation pick one of the career categories discussed today and imagine that you are interviewing for a position in that field. What questions would you expect from your interviewer? What questions would you ask your interviewer?

CAREER CATEGORY CHOICE

#### Interviewer's Questions:

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#### Your Questions for the Interviewer:

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