Time	Suggested Remarks	Icon	Tips/Notes
10 min	**Expedite Guidelines** **Refer** participants to page 8 in the handouts, Guidelines for Expediting. Review the guidelines, adding in examples as appropriate. **Instruct** participants to complete the 2 questions on the bottom of page 8. Remind participants of some guidelines you have for member service in other areas of the credit union. Examples: ▪ Using the member's name ▪ Answering the phone in two rings **Call on** several participants to respond. **List** on a flip chart some of the additional ways that participants have observed staff members expediting.		**Expedite Guidelines** **P 8** **Note**: Expedite includes closing the sale, cross-selling additional products, and showing appreciation to members. **Note:** If you do not currently have standards for expediting at the credit union, use this seminar to help you define the standards you would like to see. If the group defines them together, they are more likely to use them in member interactions.
5 min	**Closing the Sale** **Refer** participants to page 9 in their handouts. **Introduce** Closing the sale by making the following points: ▪ Closing the sale helps members take advantage of appropriate credit union products and services. ▪ By following this process, you can effectively transition members from interest to purchase. ▪ The first step is to set the stage by making a benefit statement. ▪ The second step is to make sure that the member is ready to make a commitment. ▪ The third step is to ask for commitment. **Ask**: What questions or comments do you have about this strategy?	 	**Closing the Sale** **P 9** **Note**: Closing the sale may also refer to closing on a request from a staff person. **Note:** Tell participants that they will have a chance to practice this strategy later in the session.

© Credit Union National Association