



CU Sales:

Planning –
The Foundation of
Credit Union Sales

Detailed Training Guide
Sample Pages





Participant workbook pages

PW 8

PW 9

<p>Essential Business Skills</p> <h2 style="margin: 0;">Plan</h2> <p>Examples</p> <ul style="list-style-type: none"> <input type="checkbox"/> Set aside 10-15 minutes at the beginning of each day to plan the day's activities. <input type="checkbox"/> Use a planning tool to establish daily priorities. <input type="checkbox"/> Learn and use time management techniques. <input type="checkbox"/> Use a filing system that lets you retrieve information quickly. <input type="checkbox"/> Set specific daily, weekly, quarterly, and annual goals. <p>What standards for planning do we have at our credit union?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>List some examples of effective planning that you have seen at our credit union.</p> <p>_____</p> <p>_____</p> <p>_____</p> <p style="text-align: right;">12</p>	<h2 style="margin: 0;">Plan</h2> <p>How effectively do you use your time?</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;"></th> <th style="width: 10%; text-align: center;">Frequently</th> <th style="width: 10%; text-align: center;">Occasionally</th> <th style="width: 10%; text-align: center;">Seldom</th> </tr> </thead> <tbody> <tr><td>1. Do you set personal short-term and long-term goals?</td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>2. Is your desk organized and free of clutter?</td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>3. Do you make a daily to-do list?</td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>4. Do you prioritize the items on your to-do list?</td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;"><input type="checkbox"/></td></tr> <tr><td>5. 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Notes:

Time	Suggested Remarks	Icon	Tips/Notes
	<p>Refer participants to the questions at the bottom of page 8.</p> <p>Have participants complete the 2 questions.</p> <p>Debrief question: What standards for planning do we have at our credit union?</p> <p>Ask for examples.</p> <p>Ask: What kind of daily planning do you personally engage in?</p> <p>Ask for examples.</p> <p>Debrief question: List some examples of effective planning that you have seen.</p> <p>Ask for examples.</p>	 	<p>PW 8</p>
10 min	<p>Refer participants to page 9 in their workbook.</p> <p>Introduce How effectively do you use your time? by making the following points:</p> <ul style="list-style-type: none"> - An important component of planning is effective time management. - By assessing your time management habits, you can develop a strategy for improving the way you manage your time. 	 	<p>How effectively do you use your time? PW 9</p>

Participant workbook pages

PW 9

Plan

How effectively do you use your time?

	Frequently	Occasionally	Seldom
1. Do you set personal short-term and long-term goals?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is your desk organized and free of clutter?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you make a daily to-do list?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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14. Do you delegate appropriately?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total checks in each column	—	—	—

>> Turn page to interpret results _____

13

PW 10

Essential Business Skills

Plan

How effectively do you use your time?

Total checks in each column:

Frequently _____ × 4 = _____

Occasionally _____ × 2 = _____

Seldom _____ × 0 = _____

Total = _____

Scoring:

50 – 60 Excellent, you manage your time well

39 – 49 Not Bad







28 – 38 Uh-oh

17 – 27 You are overwhelmed

0 – 17 Yikes!

14

Notes:

Time	Suggested Remarks	Icon	Tips/Notes
	<p>Instruct participants to complete the assessment on page 9 of their workbook.</p> <p>Direct participants to read each statement and place a check in the box that describes how frequently they engage in each behavior.</p> <p>Direct participants to count the checks in each column and place the total in the box at the bottom of each column.</p>	 	<p>Time assessment</p> <p>PW 9</p>
	<p>Refer participants to page 10. Tell them to enter the totals in the appropriate columns. Then multiply the total in each column by the appropriate number.</p> <p>Option: Post the formula on a flip chart to explain scoring and complete a sample calculation with the group:</p> <ul style="list-style-type: none"> - Frequently $\underline{6} \times 4 = \underline{24}$ - Occasionally $\underline{6} \times 2 = \underline{12}$ - Seldom $\underline{2} \times 0 = \underline{0}$ <p>Refer participants to the scoring grid on the bottom of page 10.</p> <p>Ask:</p> <ul style="list-style-type: none"> - What is your reaction to your score? - How many of you could improve your time management strategies? <p>Ask for comments and reactions.</p>	   	<p>PW 10</p>