



CU Sales

Planning – The Foundation of Credit Union Sales

Participant Workbook *Sample Pages*

Seminars in a Box License

You have purchased Credit Union National Association, Inc.'s (CUNA) *Seminars in a Box* training materials ("SIB") via CD-ROM including:

- ♦ Participant Workbook Microsoft Office Word file
- ♦ Detailed Training Guide Microsoft Office Word file
- ♦ Program Overview Microsoft Office Word file

Use of the materials is subject to the following terms and conditions. If you do not agree to abide by these terms and conditions, you may return the product to CUNA before use for a full refund. Your use of the SIB materials will signify your acceptance of the terms. You are responsible for installation of the CD-ROM at your location. CUNA shall not provide any technical support services for SIB.

You may:

- ♦ Use SIB only for your internal training and then only as intended by this License;
- ♦ Save a copy on your local server or desktop;
- ♦ Print out copies of the files for your participants or your trainer;
- ♦ Customize wording to best fit your credit union terminology as long as it does not alter the original meaning of the training materials;
- ♦ Use individual exercises or pieces of the content for meetings, discussions, or training within your organization; and
- ♦ Add your logo to the existing materials for distribution within your organization.

You may not use SIB externally to:

- ♦ Reproduce (except as set out above) or transmit SIB materials, in any form or by any means, without prior written permission of CUNA;
- ♦ Remove CUNA copyrights or the "CUNA" and "Seminar in a Box" logos;
- ♦ Post the information on an Intranet or the Internet; or
- ♦ Adapt or reuse the training for another purpose without prior written permission from CUNA.

SIB materials are designed to provide accurate and authoritative information with regard to the subject matter covered. However, CUNA does not make any express or implied warranty or assume any legal liability or responsibility for accuracy, completeness, or usefulness of any information contained in SIB. SIB is sold with the understanding that CUNA is not engaged in rendering legal, accounting, or other professional advice or services. If expert assistance is required, the services of a competent professional should be sought.

You must at all times hold SIB materials in confidence with the same degree of care with which you protect your own confidential and proprietary information.

While CUNA allows certain minor revisions to SIB materials to customize them for your specific use, CUNA assumes no liability for any revision not made by CUNA. You indemnify CUNA for any liability resulting from your revisions to the materials. Your permitted revisions to the product will not have the effect of removing any CUNA copyrights to the original material.

Copyright © 2007
Credit Union National Association, Inc. All rights reserved.



Plan

How effectively do you use your time?

	Frequently	Occasionally	Seldomly
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"/>
4. Do you prioritize the items on your to-do list?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you complete the tasks on your to-do list?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Is it easy to locate information in your files?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Are you on time for meetings and appointments?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you complete projects on time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you handle each piece of paperwork only once?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you suggest improvements to management?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you prepare for member contacts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you analyze member contacts to learn from the experience?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. When interrupted, can you return to a task without losing momentum?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you delegate appropriately?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total checks in each column	_____	_____	_____

Turn page to interpret results _____

Planning – The Foundation of Credit Union Sales

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!