



2010 CUNA Sales & Service Training

CUNA Sales & Service Culture Institute
April 19-21 • Denver, CO

CUNA World-Class Customer Service
Executive Institute
October 4-7 • Denver, CO

CUNA's Creating Member Loyalty™
System of Training

*Learn how to
develop gold ribbon
service to strengthen
your bottom line.*



Sales culture is a process of ongoing improvement.

Whether you're just starting or trying to ratchet your performance to the next level, you can increase the rate of change by auditing your existing practices. By keeping up-to-date on the latest training, you will outperform your counterparts who don't.

The five areas critical to the development of a sales culture:

- 1 Executive leadership and vision
- 2 Frontline activities and processes
- 3 Human capital
- 4 Performance metrics
- 5 Top-notch service

Credit unions genuinely serve local communities and have historically provided stellar service.

Be rigorous in protecting your service advantage over larger competitors by using CUNA sales & service training.

CUNA Sales & Service Culture Institute

April 19-21, 2010
Denver, CO
Tuition: \$1,195
(\$1,295 after March 7, 2010)

Explore the training, strategizing, and coaching skills you'll need to strengthen member relations and improve your bottom line. Discover how to create a new, vigorous sales culture in your credit union — from the front line to the back office!

Who should attend?

The CUNA Sales & Service Culture Institute is designed for CEOs, senior management, branch managers, and those vested with the responsibility to transform the service culture of their credit union.

"I learned how to motivate my staff and put sales into a different perspective that is exciting, motivating, and most importantly, a big key to 100% member satisfaction."

- Past Attendee

MONDAY

7:30-8:00 a.m.

Registration & Networking Breakfast Provided

8:00-8:15 a.m.

Orientation

8:15-11:45 a.m.

Critical Success Factors for a Value-Driven Sales Culture

- Understand the power of an aligned organization
- Learn the relationship management model: Defining the member experience
- Discover the sales management process: Defining the employee experience

Successfully Navigating Organizational Change

- Connect your business drivers to create a service and sales culture
- Discover the steps to implement successful change
- Evaluate the gaps in your current sales culture
- Define your role in the change process

11:45 a.m. -1:00 p.m.

Networking Lunch Provided

1:00-4:30 p.m.

Transitioning to a Sales Environment

- Communicate your vision to staff
- Re-define roles and expectations
- Evaluate organizational needs
- Explain measurement
- Establish team goals and rewards

TUESDAY

7:30-8:00 a.m.

Networking Breakfast Provided

8:00-11:45 a.m.

Transitioning to a Sales Environment (continued)

- Train best practices for sales culture success
- Coach one-on-one and examine sales meetings
- Communicate team progress
- Learn how to reward progress
- Evaluate overall achievements

11:45 a.m.-1:00 p.m.

Lunch on Your Own

1:00-4:30 p.m.

Advancing Your Sales Culture

- Add individual goals
- Elevate your coaching process
- Publish progress reports
- Recognize individuals and team successes
- Handle poor performance

WEDNESDAY

7:30-8:00 a.m.

Networking Breakfast Provided

8:00-11:45 a.m.

Transforming to a High Performance Sales Culture

- Define compensation structures
- Simplify tracking using measurement and information systems
- Learn about advancing sales training and coaching

Action Planning

- Establish an implementation plan

11:45 a.m.-Noon

Wrap-Up

- Evaluations
- Certifications

Schedule is subject to change.

HOTEL INFORMATION

Grand Hyatt Denver

1750 Welton Street
Denver, CO 80202
Phone: 303-295-1234
Fax: 303-292-2472

Reservations:
800-233-1234

Room rates:

\$175 single/double*

Hotel Reservation Deadline: March 29, 2010

* Room rates and availability cannot be guaranteed. Rooms may be sold out prior to this date, so make your hotel reservations early! Room reservations and fees are the responsibility of the registrant. To claim this room rate, call for reservations and reference "CUNA" or "Credit Union National Association."

FEATURED SPEAKERS

Angela Prestil

Angela is director of sales culture development for the Creating Member Loyalty™ System of Training at the Credit Union National Association (CUNA). Her responsibilities include ensuring the successful implementation of the Creating Member Loyalty™ program for more than 200 credit unions nationwide, as well as managing the development and design. Angela brings more than 20 years of experience developing and delivering educational programs and products to CUNA. Angela has conducted training around the country at League meetings, CUNA schools, and CUNA webinars.

Carla Schrinner

As master trainer for the Creating Member Loyalty™ System of Training at the Credit Union National Association (CUNA), Carla has coached, trained, and certified more than 350 credit union trainers. She's conducted participant training for credit unions both here in the U.S. and internationally in a number of programs and designs and develops custom training solutions for credit unions. Carla is also responsible for consulting with credit unions to help implement and drive the training solutions in her role as implementation manager. She works regularly with credit union's senior teams to ensure that the programs effectively meet their business strategy.



RON BLUMCOFF FOR THE DENVER METRO CONVENTION & VISITORS BUREAU

Register Today! Visit training.cuna.org and choose *Schools & Conferences.*

CUNA World-Class Customer Service Executive Institute

**October 4-7, 2010
Denver, CO**

Tuition: \$1,595
(\$1,695 after August 20, 2010)

When was the last time you were "wowed" by a customer service experience? Is it hard to remember? Unlike any other hotel, The Ritz offers exemplary customer service throughout its employee base, from the front desk to housekeeping. Attendees at this institute will explore The Ritz on-site and then apply the hotel's award winning philosophy to the credit union environment.

Who should attend?

The CUNA World-Class Customer Service Executive Institute is designed for credit union leaders at any level working toward quality member service. Past participants have included presidents, CEOs, VPs of lending and marketing, branch managers, and executive management at credit unions of all sizes.

"This was an excellent program! Our credit union is ready and willing to take our service level from great to world-class and this conference has showed us how."

• Past Attendee

MONDAY

7:30-8:30 a.m.
Registration & Networking Breakfast Provided

8:30-8:45 a.m.
Welcome & Orientation

8:45-11:30 a.m.
The State of Service in America

- Examine America's current state of service
- Explore the financial impact of poor and great service
- Identify three distinctions of a world-class company

11:30 a.m.-1:00 p.m.
Lunch on Your Own

1:00-4:30 p.m.
Learning From America's Best Service Providers

- Discuss what the best do differently
- Commit to becoming a learning organization
- Examine advertising vs. empowerment
- Identify ways to create experiences — not just transactions

4:30-5:30 p.m.
Welcome Reception

TUESDAY

7:30-8:30 a.m.
Networking Breakfast Provided

8:30 a.m.-3:00 p.m.
Service Excellence: The Ritz-Carlton Strategy & House Tour

- Discover the Ritz-Carlton "gold standards," daily line-up, business management model, and employee empowerment process
- Learn how the Ritz-Carlton's process builds customer loyalty
- Hear wow stories that make lifelong customers
- Get a behind-the-scenes and front-of-the-house tour of the Ritz-Carlton
- Gain incredible insights as you witness the Ritz-Carlton staff in action

11:30 a.m.-1:00 p.m.
Networking Lunch Provided

3:00 p.m.
World-Class Service in Denver

- Observe service standards at various Denver businesses
- Discuss strategies for applying world-class Denver service at your credit union

WEDNESDAY

7:30-8:30 a.m.
Networking Breakfast Provided

8:30-11:30 a.m.
Designing a World-Class Service Program for Your Credit Union

- Explore where great service begins
- Learn the three steps in designing a world-class service environment
- Transition satisfied members into raving fans
- Discover the power of recognition and celebration

11:30 a.m.-1:00 p.m.
Lunch on Your Own

1:00-4:30 p.m.
Don't Manage – Coach for Service Excellence

- Hire the smile – train the skills
- Develop leaders and retain talent
- Discuss ways to measure employee service levels

THURSDAY

7:30-8:30 a.m.
Networking Breakfast Provided

8:30-11:45 a.m.
Create a Plan & Timeline

- Identify how people support what they create
- Learn strategies for re-entry

11:45 a.m.-Noon
Wrap-Up

- Evaluations
- Certifications

Schedule is subject to change.

HOTEL INFORMATION The Ritz-Carlton, Denver

1881 Curtis Street
Denver, CO 80202
Phone: 303-312-3800
Fax: 303-312-3801

Reservations: 866-755-5798
Room rates: \$235 single/double*

Hotel Reservation Deadline: September 2, 2010

** Room rates and availability cannot be guaranteed. Rooms may be sold out prior to this date, so make your hotel reservations early! Room reservations and fees are the responsibility of the registrant. To claim this room rate, call for reservations and reference "CUNA" or "Credit Union National Association."*

FEATURED SPEAKER

Rick Olson

Rick is one of the leading speakers in the credit union movement and has a gift for bringing simple solutions to complex problems. Every year he speaks at 60-70 credit union events nationwide. Rick is the author of two highly acclaimed STAR modules on sales and member service, and also wrote *Unleash Your Greatness*, in which he shares the keys to becoming a person of impact. Rick's speaking style is humorous, with lots of audience participation.



STAN ORBERT FOR DENVER METRO CONVENTION & VISITORS BUREAU

Register Today! Visit training.cuna.org and choose *Schools & Conferences.*

For More Information

Visit: training.cuna.org

Program Content:

Call: 800-356-9655, ext. 4249
E-mail: training@cuna.coop

Registration Information:

Call: 800-356-9655, ext. 2400
E-mail: reginfo@cuna.coop

Council Discount

CUNA Council members receive \$100 discount on select schools and eSchools and a \$50 discount on webinars. To learn more about CUNA Councils, visit cunacouncils.org.

Continuing Professional Education (CPE) Credits

CUNA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site: www.nasba.org.



CPE Credits: You can earn 21 group-live CPE credit hours for CUNA Sales & Service Culture Institute and 25 group-live CPE credit hours for CUNA World-Class Customer Service Executive Institute. No advance preparation or prerequisites are required. For more information regarding administrative policies, such as complaint and refund, please contact CUNA at 800-356-9655, ext. 4249.

Travel Arrangements

United Airlines is the "Official Airline" for the programs. To make reservations, visit www.united.com or call United's Specialized Meetings Reservation Center at (800) 521-4041. Please reference ID# 553SF.

Cancellations & Refunds

Cancellations received in writing (via fax 608-231-4327) seven or more days before the start of the program are eligible for a refund of the amount paid minus a \$200 administrative fee. No refunds will be granted if cancellation is received six days or less before a program begins. Substitutions are accepted anytime prior to the start of the program at no additional cost. Simply fax an updated registration form, listing the new participant and who they will be replacing.



Experience Learning like never before with CUNA Center for Professional Development. For more than 40 years, we've helped people reach their personal and professional potential to maximize credit union performance. With training designed for credit unions by credit union people, our content is second to none and our business results help credit unions thrive. We deliver expert information, resources, and networking opportunities that inform and motivate staff and volunteers to deliver innovative ideas and exceptional strategies to your credit union. **Guaranteed.**

2010 Online Sales & Service Training At-A-Glance

SPRING

CUNA Succeeding in Member Sales eSchool

Presented by Angela Prestil, this eSchool will inspire new sales people, rejuvenate veterans, and help non-sales professionals become an effective part of the sales team.

May 5, 2010

Developing Outstanding Member Service

May 12, 2010

Inquiring & Listening for Member Needs

May 19, 2010

Linking Member Needs to Credit Union Service

May 26, 2010

Closing Member Sales With Confidence

SUMMER

July 29, 2010

Critical Success Factors for a Value-Drive Sales Culture

Presented by Carla Schrinner, this webinar will focus on the 3 critical success factors common to value-driven organizations and how to differentiate your credit union through effective sales and service efforts.

August 19, 2010

Three Phases of Sales Culture Development

Presented by Carla Schrinner, this webinar will identify sales culture development benefits, and you will hear practical ideas on how to improve your results and further advance your initiative.

FALL

November 9, 2010

Effective Incentives

Presented by Denny Graham, this webinar will review the basics of incentive theory, examine how you can tie incentives to a compensation philosophy, and identify common incentive design options along with their strengths and weaknesses.

November 16, 2010

Tracking & Measuring Your Sales Success

Presented by Denny Graham, this webinar will define appropriate tracking measures along with learning about balanced scorecards including what one can do to support an effective sales and service culture at your credit union.

NOW AVAILABLE FOR PURCHASE!
One-hour consultation with Denny Graham on implementing webinar components at your credit union!

To register or learn more about these training options, visit training.cuna.org and choose *Webinars & eSchools*.

CREATING MEMBER LOYALTY™ SYSTEM OF TRAINING

Service has always been the true differentiator between credit unions and other financial institutions. Building on this distinctive strength, the Creating Member Loyalty™ System of Training is designed to help credit unions serve members better and increase bottom-line sales.

Creating Member Loyalty™ uses exceptional service to drive sales.

It initiates a change of both individual and organizational behavior throughout your credit union, helping you cultivate a sales culture that exceeds your members' expectations.

More than just a single training session, the program includes training and implementation services, and provides long-term staff development.

What You Can Expect

TRANSFORMATION

Helping you create a new culture

The days of waiting for a member to walk in or call are over. Competing and thriving in today's market requires anticipating members' needs. When those needs are met, true loyalty is formed. Our training systems and solutions will help initiate a complete transformation of your employees and your organizational focus.

Your Employees

Before

Order-takers
Product-focused
Reactive

After

Consultative service providers
Member-focused
Proactive

Your Organizational Focus

Before

Cross-sales ratios
Member satisfaction
Volume-driven

After

Profitable relationships
Member loyalty
Value-driven

RESULTS

A positive impact on your bottom line

Without tangible benchmarks, it's impossible to evaluate the success of a training program. The Creating Member Loyalty™ System of Training was created to generate specific, measurable results so that you can see the positive effects on your bottom line.

Take a look at the overall results reported and measured by one credit union.

At Start of Training

30% Profitable Households
2.96 Services Per Household

20 Months Later

58% Profitable Households
3.07 Services Per Households

How to bring Creating Member Loyalty™ to your credit union

The first step is to contact us by visiting training.cuna.org/cml, calling 800-456-0543, or e-mailing cml@cuna.com. We'll be happy to answer your questions and show you how easy it is to bring the training system to your credit union.



How It Works

THE SYSTEM

Three components designed to transform your culture

The Creating Member Loyalty™ System of Training is segmented into three competency areas: Sales Strategies, Sales Leadership, and Service Strategies. Each competency area consists of multiple programs, each containing a process overview, video model, and hands-on skill practice exercises. The system's flexibility enables you to tailor the training to your specific needs, and allows your staff to put their new skills into practice immediately.

Sales

- Core
- Referral
- Advanced Sales
- Call Center
- Aisle Promoting

Sales Leadership

- Sales Leadership Strategies
- Call Center: Coaching
- Sales Accelerator

Service

- Staff
- Managers

Additional components allow you to build on the core skill sets:

■ **Product Knowledge** – A software-based training system that helps you construct profiles on each of your products and services. Once created, the program helps you develop your staff's ability to communicate the value of the products and services in a clear, consistent manner.

■ **Selling to Small Businesses** – A comprehensive system for creating opportunities with small businesses, involving everything from prospecting to managing relationships.

■ **Consulting and On-Site Implementation Services** – Our team of consultants are available to provide on-going support for your credit union — before, during, and after your training. Services include organizational analysis for support of sales/service culture, implementation planning, key stakeholders meeting facilitation, and much more.

■ **Trainer Certification** – Your trainers attend a 5-day certification session for an in-depth understanding of the program content and skills. They also practice and receive coaching on facilitation skills necessary to deliver these programs successfully.

“We saw a 6% increase in check card penetration, an 11% boost in online banking use, and an 18% increase in the number of households with vehicle loans. Much of the increase relates to the concept — reinforced by training — that sales is service and service is sales.”

*- Sonya McDonald, VP Sales & Business Development
Randolph-Brooks Federal Credit Union, Texas*

THE LEARNING DESIGN & METHODOLOGY

From the classroom to the credit union

Creating the essential techniques that make this program a success begins in the classroom. Employees will observe and practice proven methodologies that deliver both service and sales to members. They'll work closely with a trainer and their peers in simulating job-related situations, incorporating performance feedback, and refining skills.

Learners receive tools to transfer these techniques into their everyday performance. Managers receive training and tools to sharpen their skills and to continue staff development on the job.

THE IMPLEMENTATION

A customized, three-phase approach

Achieving your credit union's ambitious goals requires a sound implementation strategy. The general program implementation process involves three phases, guided by your Creating Member Loyalty™ System consultant.

1 Planning

A key stakeholders meeting begins the process, and is followed by assessments and field research to help clarify the training focus. Support issues are then addressed, and the program's roll-out strategy and validation criteria are established.

2 Implementation

In this phase, internal credit union trainers are certified. Internal marketing and communications plans are created and distributed, and a detailed training schedule is developed. Baseline information is gathered for ongoing evaluation, and training for targeted groups is delivered.

3 Evaluation and Revision

The final phase ensures the quality of the program's delivery. An ongoing management review of the organization support is completed, and results are validated. An action plan for continued improvement is developed and implemented.



Credit Union National Association

PO Box 431 | Madison, WI 53701-0431

A large, flowing gold ribbon graphic that starts from the left side of the page and curves downwards and to the right, framing the main title.

2010 CUNA Sales & Service Training

*Learn how to set the
gold standard at your
credit union.*

Visit **training.cuna.org**