

# **CML User's Workshop**

## **Sunday, October 26, 2008**

### **Tempe Mission Palms**

#### **Tempe, AZ**

### **CML Update**

In November, 2007, the Creating Member Loyalty system of training was transferred from CUNA Mutual Group to CUNA's Center for Professional Development. A lot has happened this past year! We'll kick off the day by sharing some of the changes during the transition, as well as giving you a special preview of what you can look forward to in the coming months.

#### **Program Updates:**

- Advanced sneak preview
- Building the CML community
- Selling to small businesses
- Coaching certification
- Sales accelerator
- Webinars
- CPD and CUNA ties

### **Sustaining and Energizing Your CML Implementation**

How is CML currently integrated into your credit union's culture? If it isn't, what is holding you back? Discover strategies to effectively integrate your CML training initiative organization-wide in order to sustain positive results.

- Learn about The Pyramid – Sustaining – Energizing
- Understand how CML is integrated into organizational alignment
- Determine the level of focus that will make the difference
- Gather activities for team meetings

### **Measurement/Tracking/CRM Practices**

On-going measurement of sales and services doesn't have to be static, dull, or complicated. Measure links to create meaningful coaching conversations that influence decisions affecting your business strategies.

- Understand the guiding principles for measuring your sales and services
- Learn key measurement criteria for both your sales and services
- Discover examples of areas you can measure
- Share ideas with your colleagues

## **Staff Development Plans (CU University)**

A Credit Union University can help your credit union optimize time, resources, valuable training dollars, and professional development opportunities for your staff. Integrating the CML programs into your CU University will help you align your CML training with your credit union's business goals and provide an umbrella under which training and professional development can reside.

- Discover how a Credit Union University can reinvigorate your training initiatives
- Understand how career-pathing, development plans and staff competencies provide the foundation for a Credit Union University
- Learn how to incorporate CML into your Credit Union University

## **Coaching: The Role, The Tools, The Best Practices**

Coaching is about motivating people to be winners! This session will explore what the role of the coach looks like, how to integrate that role into your organizational culture, and how to make coaching a win-win-win for the coachee, the coach, and your credit union.

- Learn the basics of coaching
- Discover how getting "back to the basics" can be the foundation to coaching success
- Find the keys to coaching effectiveness

## **Training Clinic**

Training CML programs is fun and rewarding. It's also not without occasional challenges. Here's an opportunity to gain insights from a Master Trainer and practice the skills that will make you a stronger trainer of both the CML programs and all credit union training.

- Experience effectively managing skill practices
- Learn how to integrate other programs into skill practices
- Practice handling common objections and concerns within the classroom
- Discover how to integrate refresher training into your staff development plans