

Roles & Responsibilities

To support CUNA's Creating Member Loyalty™ System of Training

■ ROLE OF CEO/PRESIDENT & EXECUTIVE MANAGERS

- Communicate expectations of training and/or culture change to all staff and managers.
- Be role models for managers, supervisors, staff, and each other.

Responsibility:

Demonstrate use of program skills and action steps. Coach and reinforce managers' skill use by holding regularly scheduled coaching sessions. Use the skills and action steps as defined in the program to coach managers. Ask for progress reports from managers and trainers. Provide feedback to trainers regarding challenges that managers are having with coaching their staff and areas where managers could use additional practice.

■ ROLE OF MANAGERS & SUPERVISORS

- Communicate expectations to the staff for behavior during and after the training.
- Set goals for specific learning objectives, linked to corporate priorities.
- Be role models for staff and each other.

Responsibility:

Demonstrate use of program skills and action steps. Ask for progress reports from staff and trainers during the training process. Observe employees using their newly acquired skills and provide feedback and reinforcement. Hold regularly scheduled coaching sessions with employees to discuss their use of new skills and their effectiveness incorporating program concepts and behaviors on the job. Provide feedback to trainer regarding challenges that employees are having with skill areas and where employees could use additional practice.

■ ROLE OF TRAINERS

- Communicate support needed from credit union management.
- Create and maintain an adult learning environment in the training room.
- Be role models for managers, supervisors, and staff.

Responsibility:

Demonstrate use of program skills, inside and outside the training room. Consult with managers on ways to incorporate the program principles into the daily operations of the credit union

(e.g., staff meetings, service goals, standards, tracking performance). Link the program principles to the credit union's mission statement and other corporate initiatives. Provide progress reports to managers on staff performance in training. Determine additional training needs by requesting feedback from managers and staff on challenges. Schedule additional practice opportunities for managers and staff when appropriate.

■ ROLE OF STAFF

- Be role models for members and other staff.

Responsibility:

Demonstrate use of program skills with members and with employees. Consult with supervisor on ways to integrate program principles into daily job duties. Provide feedback to supervisor about challenges in implementing program concepts and behaviors. Request additional practice opportunities for continual growth and mastery of the skills and service situations.

■ For information about how to bring this training system to your credit union, visit training.cuna.org/cml, call 800-456-0543, or e-mail cml@cuna.com.