

Creating Member Loyalty™ System of Training

# Sales Leadership

Coaching  
your team.  
Driving results.

CREATING  
MEMBER  
LOYALTY™  
SYSTEM OF TRAINING

Credit union managers are the link to long-term, sustainable results for any training solution targeted to staff.

# Sales Leadership

*Sales leadership for credit union managers*

## SALES LEADERSHIP CONSISTS OF THREE PROGRAMS:

- **Sales Leadership Strategies**  
Helping front-line managers transition from an operations focus to a sales management focus.
- **Call Center: Coaching**  
Providing the tools to support and strengthen sales and service effectiveness.
- **Sales Accelerator**  
Providing necessary skills required to put strategy into action.

## LEADERSHIP/COACHING COMPETENCY

Research clearly shows that among all the elements necessary to create and maintain organizational sales effectiveness, none is more critical than a strong leadership system. Yet, frequently front-line staff are promoted to management roles without the additional tools necessary to coach, develop, and lead their staff successfully. CUNA's Creating Member Loyalty™ Sales Leadership Programs provide behaviors, processes, and strategies for managers to consistently reinforce credit union initiatives and develop staff.

## LEARNING OBJECTIVES

- **Plan** strategic activities to help meet corporate/branch goals
- **Translate** strategy into clear targets and action plans
- **Coach** employees to strengthen skill and competency levels
- **Evaluate** sales performance against targets
- **Function** as a role model for all expected behaviors

# Sales Leadership Strategies



**Sales Leadership Strategies is a comprehensive four day training program specifically designed to help credit union managers and supervisors transition from an operations focus to a sales management focus.** It develops skills in three critical sales management components: sales planning, performance management, and coaching to:

- Increase sales and profitability
- Strengthen member relationships
- Increase efficiency
- Maximize performance

## THIS PROGRAM IS DESIGNED FOR

- Branch managers and supervisors
- Member service/lending supervisors
- Regional/executive sales managers

## LEARNING OBJECTIVES

- **Strengthen** employee-manager relationships through communication
- **Motivate** employees to exceed member expectations
- **Focus** energy only on the activities that will produce the most results
- **Gain** enthusiastic staff support and involvement in reaching sales goals
- **Coach** employees to strengthen individual sales performance
- **Lead** motivational, productive, and sales-focused meetings

## PROGRAM CONTENT

### Sales Management Skills

- Maintain and Enhance Self-Esteem
- Focus on Specific Behavior and Outcomes
- Use Reinforcement Techniques
- Use Listening Skills
- Set Goals and Follow-Up Dates

### Sales Management Processes

- Setting Goals and Developing Action Plans
- Coaching Sales Performance
- Conducting an Effective Sales Meeting
- Handling a Performance Problem
- Assessing Sales Performance

### Sales Management Planning

- Resource and Marketplace Assessment
- Sales Planning Process
- Guideposts for Sales Planning
- Analyzing the Competition
- Sales Plan Development



## TRAINING TIME

- 7 modules
- 10-26.5 hours (excluding sales planning pre-work)
- More than 130 examples and exercises

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

# Call Center: Coaching



**This program reinforces the sales and service model and strengthens the member experience.** Call center managers can provide valuable encouragement and support to strengthen the sales and service effectiveness of their team. By routinely reviewing actual member interactions during one-on-one coaching sessions, call center representatives receive targeted feedback and systematically learn a process for self-assessment. Typical credit union call center examples are used to directly engage managers in simulated coaching experiences. Managers will be able to immediately apply skills and strategies to coach their staff.

## THIS PROGRAM IS DESIGNED FOR

- Call center managers

## LEARNING OBJECTIVES

- **Improve** staff effectiveness by providing balanced feedback — focusing on key strengths and areas for improvement
- **Create** linkages between service skills, sales effectiveness, and member loyalty
- **Strengthen** staff's critical understanding of the sales and service process and enable them to self-assess
- **Build** an environment that encourages and rewards effort toward achievement of credit union goals

## PROGRAM CONTENT

### Coaching Overview

- The Coaching Process
- Sales Effectiveness Equation
- Key Success Factors

### Leadership Skills

- Effective Coaching Behavior
- Maintaining and Enhancing Self-Esteem
- Focusing on Specific Behaviors and Outcomes
- Listening
- Setting Goals and Follow-up

### Situation-Based Coaching

- Call Monitoring and Assessment
- Interaction Overview
- Situation-Based Coaching Action Steps
- High-Impact Questions
- Coaching Tips



## TRAINING TIME

- 7.5 hours

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## Sales Leadership Strategies

# Sales Accelerator



**Sales Accelerator is known as “short-cycle sales management” based on its systematic process for coaching sales staff on a weekly and bi-weekly basis (i.e. short-cycle).** This process actively engages sales managers in two critical aspects of sales team performance; sales activities and personal effectiveness. By linking weekly staff activities and effectiveness with targeted business goals, sales results accelerate rapidly along with the value experienced by your members. In practice, this process takes only a few hours each week. Yet it dramatically increases the effectiveness of the time spent managing sales and strengthening the sales team.

### THIS PROGRAM IS DESIGNED FOR

- Front-line sales managers
- Regional and senior-level sales/service managers

### LEARNING OBJECTIVES

- **Focus** weekly staff activities on the credit union’s highest-impact priorities
- **Systematically** communicate how weekly staff activities impact key credit union strategies
- **Engage** sales team in effective meetings focused on relationship-building efforts with members
- **Strategically** target coaching activities aimed at long-term staff development
- **Influence** the future results of individual sales staff using trend-analysis tools
- **Quickly** adapt short-term action plans and strategies as needed to meet member needs and achieve sales targets

### PROGRAM CONTENT

#### Scorecard Development (Pre-Course Preparation)

- Selecting 3-4 key business priorities
- Identifying the success measures that will drive sales managers’ activities

### Skills

- Maintaining and Enhancing Self-Esteem
- Focusing on Specific Behavior and Outcomes
- Asking High-Impact Questions
- Using Listening Skills

### Processes

#### Credit Union Strategy

- Member Relationship Management
- Business Priorities and Activity Standards

#### One-on-One Coaching

- Trend-Based Coaching
- Opportunity-Based Coaching

#### Team Meeting and Coaching Processes

- Sales Staff Deployment Meetings
- Sales Staff Assessment Meetings
- Team Performance Meetings

### Strategies and Tools

- Analyzing Performance Trends
- Scorecard Management and Priority Analysis
- Pre-call Planning and Post-Call Review
- Meeting Agendas and Manager Toolkit



### TRAINING TIME

- 3-9 modules
- 8-25 hours

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The Creating Member Loyalty™ System of Training provides research-based training and consulting customized for credit unions and is designed to increase organizational and individual sales effectiveness. Credit unions throughout the U.S. have successfully integrated this training to improve sales, service, and sales leadership within their organizations.