

Creating Member Loyalty™ System of Training

Service Strategies

Answering
your
members'
needs.

CREATING
MEMBER
LOYALTY™
SYSTEM OF TRAINING

Service Strategies

Every employee is an important link in the effort to exceed member expectations for services

Creating Member Loyalty™ Service Strategies provides a clear service model designed to build a positive experience for every member, every time. Having a clear model makes it easy for employees to apply, and easy for managers to reinforce. Service Strategies provides employees with the skills to demonstrate consistent professionalism and quality service; internally and externally, in both routine and challenging situations.

SERVICE STRATEGIES CONSISTS OF TWO PROGRAMS:

■ Service Strategies for Staff

Provides the tools to build a sales and service model to provide a positive member experience

■ Service Strategies for Managers

Provides the skills to manage the three critical actions related to member service

SERVICE COMPETENCIES

Service competencies apply to all staff, whether front-line, support, or management. Effective service behaviors target internal and external customers to create a consistently professional experience for members and employees alike. Creating Member Loyalty™ Service Strategies clarify service standards and attach concrete behaviors and processes to what might otherwise be abstract concepts.

Learners practice specific behaviors that demonstrate the following service essentials:

- Make the member feel valued
- Offer assistance beyond what is specifically asked
- Use problems and complaints as a way to improve service
- Take personal responsibility for every service outcome
- Increase understanding of credit union products and the organization

Service Strategies Staff



Service Strategies reinforces the value of an integrated sales and service model to build a positive experience for members. Your credit union will define superior service, identify barriers to delivering it, and learn proven behaviors to minimize barriers and reduce stress. This allows more focus and energy on meeting and exceeding member expectations for service while still balancing operational tasks. A variety of delivery channels and staff positions are presented and engage learners in their own daily reality for immediate transfer of learning to the job.

THIS PROGRAM IS DESIGNED FOR

- Managers/Supervisors
- All credit union staff

LEARNING OBJECTIVES

- **Create** positive member experiences at every member contact point
- **Enhance** member relationships and foster internal teamwork
- **Encourage** creativity and initiative in service delivery
- **Differentiate** the credit union from competitors

PROGRAM CONTENT

Defining Member Service:

Breaking the Barriers to Member Service

- Credit Union Mission
- Critical Contact Points
- Member Service Chain
- Superior Service Characteristics
- Satisfaction to Loyalty

Member Service Skills

- Focus on the Member
- Enhance Self-Esteem
- Listen to Show Understanding

Member Loyalty Skills

- Maintain Personal Responsibility
- Manage Complaints
- Resolve Problems

Strategies and Processes: Skill Practice Situations

- Handling a Request for Service or Assistance
- Making a Request for Service or Assistance
- Satisfying an Angry Member



Total Training Time

- 12-15 hours
- More than 150 examples and exercises

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.

Service Strategies Managers



Exceeding member expectations requires on-going discretionary effort from employees. The role of the manager is to create a work environment which supports this. This training will help leaders with three of the critical actions related to member service, which are: formally establishing and communicating the service goals and member service standards for their unit; serving as a role model for member service when dealing with members, peers and employees throughout the organization; and monitoring and providing feedback to employees on their service delivery.

THIS PROGRAM IS DESIGNED FOR

- Managers/Supervisors

LEARNING OBJECTIVES

Managers learn critical skills and proven processes and behaviors to:

- **Clarify** expectations around performance
- **Motivate** employees to exceed member expectations
- **Set** challenging, yet attainable, service goals for each unit or department
- **Skillfully** shape employee behavior through reinforcement and feedback

PROGRAM CONTENT

Setting Service Goals

Improving, or even maintaining, superior service requires clarity of priorities for staff. Goal-setting for service provides a clear and objective approach to discussing, planning, and reviewing the performance of each staff person. In this module, supervisors and managers will learn how to establish measurable and observable goals related to service for their own staff or department.

Providing Supportive Feedback

Providing feedback to employees around service situations enables a manager to systematically strengthen their employees' service delivery. This segment demonstrates how to provide feedback around less-than-positive behaviors while maintaining an employee's confidence and motivation. You will practice guiding an employee in self-assessment and strengthening an employee's ability to repeat effective service performance. This process ensures managers consistently reinforce the credit union's commitment to superior service standards.



Total Training Time

- 3-5 hours + post-session goal setting

Prerequisite:

Service Strategies — Staff Program

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The Creating Member Loyalty™ System of Training

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.

■ **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.

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. 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.

The general program implementation process involves three phases, guided by your Creating Member Loyalty™ System consultant.

1 Planning

2 Implementation

3 Evaluation and Revision

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Credit Union National Association

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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.