Team Leader's Guide

Your Credit Union

Developed By:

The Pell Group
&
Creating Member Loyalty

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Your Credit Union

INTRODUCTION

Program Objectives

Welcome to Product Knowledge Training. This program can help meet two objectives:

1) Educate staff on products offered by the credit union, and

2) Increase staff ability to determine and meet member needs.

Unlike "self-study" product knowledge programs, this program uses an approach that actively involves the staff and supervisors. It builds teamwork and confidence in a learning environment that proves effective and FUN.

How the Program Works

Team leaders, supervisors, managers, or trainers introduce their staff to specific credit union products through a [weekly, bi-weekly] sales meeting. In these meetings, employees also take part in activities to review previously covered products. These review activities may include quizzes, games, discussions, exercises, competition and prizes.

Due to the extent of employee involvement in these review activities, employees retain a very high percentage of the information covered. This allows them to speak knowledgeably and confidently to members about how credit union products can meet their individual needs. The long-term results include a sales approach that the staff feels comfortable with and which members appreciate.

Your Guides to Product Knowledge Training

Member Needs Handbook:

The Member Needs Handbook contains detailed Product Profiles for each credit union product. This guide serves as both a valuable reference tool and also as the study material for the product knowledge sales meetings.

INTRODUCTION

Team Leader's Guide:

This guide provides tools that help team leaders to prepare and conduct regularly scheduled sales meetings that are effective and fun. It includes background information on sales meetings and adult education as well as tools such as planning guides, games, exercises, and quizzes for use during the sales meetings.

How to Use the Team Leader's Guide

Before holding your first product knowledge sales meeting with your staff, you'll want to read the background information and familiarize yourself with the following planning tools in this Guide:

- Effective Adult Learning - principles that make learning experiences for adults more meaningful and produce longer lasting results.

- Meeting Guidelines - general recommendations for setting up sales meetings and facilitation tips for conducting them.

- Meeting Planning Tools - before and after meeting checklist, sample meeting planning worksheets, sample meeting agendas and action steps for conducting product knowledge training.

- Product Schedule Index - Suggested product groupings identified with meeting number at which they are scheduled for presentation.

- Guide to Meeting One - A suggested script to introduce the Member Needs Handbook and the Product Profiles to your staff at the first sales/product knowledge meeting.

- Product Review Activities - Quizzes, games, exercises and implementation ideas for reviewing Product Profile information and practicing sales skills.

MEETING PLANNING TOOLS

Meeting Planning Tools

The primary objectives of your sales meetings may vary from time to time. This section provides meeting planning tools for your product knowledge training meetings.

You'll find a **Planning Worksheet** and a set of suggested **Action Steps** for these meetings on the following pages.

The **Sample Planning Worksheet** and **Sample Meeting Agenda** that follow are just that--samples only. There is no one right format for sales meetings. Choose what you feel is most appropriate for your group, time allowance and subject matter. There are blank Worksheets, Meeting Checklists and Agendas for you to reproduce in the Section 8 of this guide.

Feel free to mix and match aids from Section 7 -- Product Review Activities. Or, you may prefer to use only one at a time. Variety and surprises keep meetings interesting and fun. Consider trying different formats and/or activities from meeting to meeting.

PRODUCT REVIEW ACTIVITIES
PROGRESS CHECK

SHARE SAVINGS ACCOUNT:

1. A *Share Savings Account* allows unlimited check writing.

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2. To become a member you must open a *Share Savings Account* and maintain a minimum balance.

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3. *Share Savings Account* requires a minimum opening deposit of $100 for all members.

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4. A related service to the *Share Savings Account* is *Share Draft*.

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5. *ATM Card* access is available with *Share Savings Account*.

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6. Name 2 potential cross-selling opportunities for a member who opened a *Share Savings Account*:

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