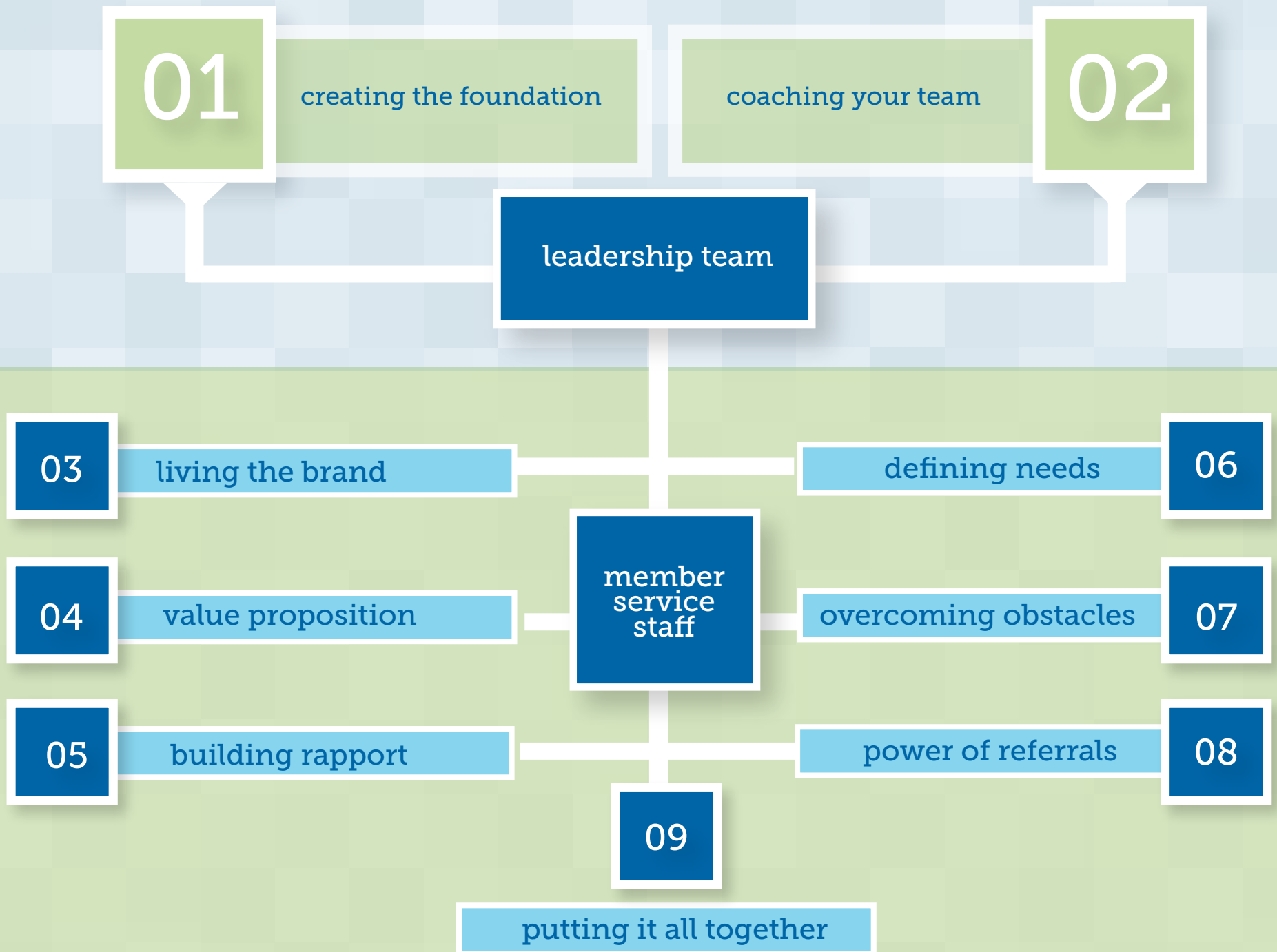


c u l t u r e

the building blocks of member engagement



building blocks: the sales culture process



leadership team



Creating the foundation

Communication for success

Learning objectives:

- Aligning goals
- Metrics
- Incentive program options
- Communication is critical
- Job description evaluation
- Getting the buy-in for success
- Reinforce the culture
- Consistent messaging
- Hiring the right people

for:
executive
team



Coaching your team

Change occurs incrementally -
reinforcing the new normal

Learning objectives

- Consistency
- Opening up dialogue
- Taking ownership
- Coaching techniques
- Knowing your audience
- Dealing with non-performers
- Creativity and having fun
- Celebrating successes and staff recognition

for: all staff
who supervise
front line
employees

member service staff



living the brand

It's the people that make our credit union successful.

Learning objectives:

- Bringing your brand to life
- Why is culture important?
- Collaboration
- Utilizing creativity
- Your sphere of influence
- Entrepreneur spirit
- Passion
- Attitude



value proposition

Who are we and why should members and non-members care?

Learning objectives:

- What is a value proposition?
- Understanding how the value proposition is a critical component for successful member engagement
- Articulating the value proposition
- Sharing the credit union story
- Understanding your audience
- The importance of being genuine
- Product knowledge



building rapport

The foundation of relationship building in our industry.

Learning objectives:

- Create a positive connection
- First impressions
- Rapport building skills
- The impact of body language
- Transitioning from personal to business conversations
- Be yourself
- Live the brand through rapport building
- Smile!

Transitioning from being rock star order takers to being proactive in the sales process.

Learning objectives:

- Why are open ended questions important?
- Using open ended questions to gather information
- Processing the information gathered and providing solutions
- Talking less, listening more
- Follow-up questions
- Defining needs process
- Active listening
- Becoming comfortable with executing this process



defining needs

You have the members attention, now what?

Learning objectives:

- Features
- Benefits
- Having impact through dialogue
- The right kind of product knowledge
- Pain points
- More follow-up questions
- Solution oriented
- Word choices

member service staff



overcoming obstacles

Successfully overcoming obstacles and building rapport in the process.

Learning objectives:

- What are the most common obstacles?
- Proactively recognize obstacles
- Techniques to overcome objections
- What are appropriate next steps when faced with an obstacle?
- Staying composed
- Using obstacles as a learning tool
- Moving past obstacles with the members best interest in mind



the power of referrals

Maximizing one of the best ways to get new business.

Learning objectives:

- Recognizing referral opportunities
- Creating new referral opportunities
- The ASK
- Building in a process
- Creating a network of members who refer on a regular basis
- Implementing the process into your day to day worklife



Let's Grow!

Putting it All Together

Pulling the entire sales process together.
Practice, practice, practice!

Motivation day!

We will review the process and celebrate our successes.

about

JRF Consulting concentrates on growth and member engagement. Julie spent 16 years at First Tech FCU before starting her business in 2009. She's passionate about helping credit unions around the country become more proactive as they build relationships within their footprint. Her business focuses on two primary areas; sales and service culture evolution and business development strategies and training. She is adept at providing new sales and service tools to front line staff and management to enhance existing member relationships. Julie is a frequent speaker at CUNA and League/Association conferences, CUES events, and teaches at two CUNA Management Schools.



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