



Your Strategic Partner for Growth

***Boost your employees knowledge, confidence,
and leadership ability to engage your members for growth!***

Increased Employee Engagement = Increased Member Engagement

Increased Leadership Effectiveness = More Engaged Employees

QUESTION #1: *Are your employees order takers (transaction-driven) OR are they engaging your members in conversations and building relationships (relationship-driven) to help them:*

- *Save money on fees*
- *Lower their monthly payments on loans not with the credit union*
- *Eliminate/Reduce high-interest-rate credit card balances*
- *Improve their credit score and manage and protect it to help them achieve financial freedom*

QUESTION #2: *Are your employees engaged to help the credit union grow through increased loan opportunities; increased membership opportunities; and increased profitability?*

We can help you boost your employees knowledge, confidence, and ability to engage your members in conversations to build stronger relationships and offer the best solutions to help them achieve financial freedom!

Increased knowledge and confidence will lead to increased employee engagement which will lead to increased member engagement. And better service will always lead to better sales: more services, more checking accounts, more loans, more loyalty, and more profitability!

cuStrategies partners with credit unions across the United States to help them train their staff to become more engaged with members to help them achieve financial freedom!

The programs we offer now (**onsite and/or virtual sessions**) are designed to help credit unions post COVID-19:

- **Strategic Planning (One-Day or Two-Day Sessions)**
 - Strategic Planning Services (Request Scope of Work)

- **Credit Scoring and Analysis (CSA) Lending & Underwriting School (Two-Day School – Onsite Training Only)**
 - Explore ways to capture more loan opportunities
 - Learn what you can do to make better loan decisions
 - Determine the best approach to assess risk without using the credit score
 - Explore ways to engage members and build stronger relationships with your members
 - Explore how credit scores are calculated
 - Learn how to complete a Credit Score Analysis (CSA) to help your members improve their credit score (Number One Tool to build relationships, increase probability of payment on loans, and increase more loan opportunities)
 - Learn how to effectively engage members in conversations during the interview process
 - Discover key strategies for effective loan notes for better loan decisions
 - Determine the best approach to close higher risk members to increase probability of payment
 - Understand how to structure loans for higher risk members

- **Member Service/Member Engagement Training Program (One-Day Program)**
 - Learn how to engage members to build deeper relationships through effective cross sale strategies
 - Determine the best approach to overcome objections confidently
 - Learn how to engage members in conversations to offer solutions to help them achieve financial freedom
 - Discover a tool you can use to make it easy for members to do business with you

- **Call Center Training Program (One-Day Program)**
 - Includes Member Service Training Components
 - Effective telephone and/or virtual strategies and techniques to increase member engagement
 - Explore ways to engage members in conversations to offer better solutions
 - Determine the best approach to cross sell and help your members
 - Discover a tool to make it easy for members to do business with you

- **Outbound Calling Program (Half-Day Program)** Robust outbound training program which includes tools and scripts to effectively engage members
 - Indirect outbound calling strategies and scripts
 - Outbound calling strategies and scripts for existing members
 - Determine the best approach to increase cross sell opportunities

- Explore effective techniques to engage members and gain commitments
- **Business Development – Re-Engaging and Re-Connecting With Your Business Partners (One- or Two-Day Program) for Growth**

COVID-19 has impacted how we engage with our SEGs/Community Business Partners. Re-connect and engage your partners for growth!

 - Explore creative strategies and offer real/relevant solutions to better support and serve your SEGs/Community Business Partners and their employees
 - Learn what you can do to build stronger relationships with SEGs/Community Business Partners
 - Determine what you can do to increase loan opportunities easily through SEGs/Community Business Partners
 - Explore ways to improve community engagement and build a strong brand and presence
 - Discover innovative networking strategies
 - Learn how to establish benchmark goals and measure/track results that impact the bottom line
 - Explore what you can do to build a formal business development/community Engagement program
 - Discover unique programs that SEGs/Community Business Partners will love to offer their employees post COVID-19
 - Determine the best approach to overcome objections and gain commitment
- **Collections Training Program Post COVID-19 (One-Day Program)**
 - Explore innovative strategies to decrease delinquencies to and prevent potential loan losses
 - Discover an innovative approach for outbound calls to increase promise-to-pay fulfillments
 - Explore PROVEN strategies to help you prevent loan losses
 - Learn what you can do to increase member engagement for future loan payments and opportunities
- **Leadership Development Programs (One-Day Programs for Managers and Aspiring Leaders)**
 - Develop your managers to become more effective change management leaders and better coaches to increase employee engagement and sales

- Develop your employees to understand their role as a leader to help the credit union grow
- **Leadership EXTRAordinaire Program (One-Day Program for All Staff)**
 - Take ownership of your leadership role
 - Identify key leadership attributes
 - Explore what you can do to enhance your leadership abilities
 - Determine how you can build your leadership brand
- **Executive Coaching Program: Senior Management and Other Managerial Levels you would like to include**
 - Become the most highly effective and influential leader you can be through this amazing and enlightening Executive Coaching Program
- **Senior Leadership/Management Program: (One Day Program)**
 - Key Leadership Strategies for Growth
 - Explore a holistic approach to growth to help your credit union achieve heightened levels of growth and success using **PROVEN** strategies and programs that have worked for other credit unions

Please reach out to me today to schedule a conference call and/or the training programs you feel would help you achieve your objectives and training needs. All training programs are customized to align with your objectives, your membership demographics, and your culture. I look forward to hearing from you!

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