

## Business Development Institute

*Building a business development program focused on cultivating relationships in the community to make a difference and grow the credit union.*

### Overview

In a competitive and ever-changing landscape, credit unions must continue to find ways to become more relevant in our communities and with businesses in our communities. This institute will provide credit union professionals with the knowledge and skills required to take your Business Development initiatives to the next level!

Learn everything you need to know to turn your program into a powerful income generator.

Explore Ways to Promote and Position Your Credit Union Within the Community

Increase membership growth, loan growth, and deposits

Increase Loyalty and Retention with Your SEGs and Community Partners

Increase Penetration with SEGs and Community Partners

Strengthen Partnerships to Support Your Business Development Program

Discover the Most Effective Approach to Measure, Track, and Communicate Success

Open Doors, Overcome Objections, and Get Past Gatekeepers

### Duration

Three Days

### Target Audience

CEO, Senior Management, Marketing Staff, Business Development Staff

Celeste Cook is founder and President/CEO of cuStrategies LLC. As a credit union industry strategist, Celeste brings you her credit union experience, expertise, proven strategies, positive energy, and passion for service! In addition to being a consultant and trainer, she is a keynote and motivational speaker with a dynamic and engaging style that has made her highly sought after within the credit union industry. Celeste has also served as an industry expert, motivational specialist, and keynote speaker for credit union associations and leagues nationwide. In addition to her role as CEO of cuStrategies LLC, Celeste has been involved in the credit union industry for more than 20 years and a professional speaker and trainer for more than 15 years. During her career, Celeste has worked for a \$1.6 billion credit union in Atlanta, Georgia, and consulted and trained with Rex Johnson of Lending Solutions Consulting.

Celeste's experienced consulting services and expert training programs/schools have helped credit unions with assets ranging from \$20 million to \$2 billion. She provides her vast knowledge, innovative ideas, and proven strategies with passion and a dynamic speaking style that is engaging and filled with positive energy! During her career, Celeste has developed, led, and implemented successful training programs, strategies, and initiatives in lending, business development, sales and service, leadership, and performance improvement. She has a definitive focus on loan growth, profitability, membership growth and retention, as well as member service.



## **Transform Your Business Development Initiatives into a Powerful Income Generator**

- Grow your credit union through Business Development.
- Build a strong brand to market to and attract new SEGs and/or community business partners.
- Create impactful marketing brochures and programs appealing to potential SEGs and Community Business Partners.
- Build stronger relationships through SEGs and the community in which you serve.
- Establish the right metrics and measure and track the right results.
- Create a business development plan, establish benchmarks, measurements, and reports to track your success.
- Learn what it takes to open doors to capture more of the market share.
- Build a competitive advantage in the market.
- Open the doors to your existing SEGs through increased touch points.
- Turn cold calls into HOT calls.
- Determine effective ways to network; working smarter, not harder!
- Master the art of relationship building/selling to open doors and keep them open.

## **Explore Ways to Promote and Position Your Credit Union Within the Community**

- Build your brand through Business Development.
- Overcome barriers and common credit union misconceptions.
- Develop and promote your program to appeal to SEGs and business partners in your communities.
- Differentiate your credit union from your competitors in today's economy.
- Consistently deliver on your Business Development brand promise.
- Create co-branding opportunities.

## **Increase Loyalty and Retention with Your SEGs and Community Partners**

- Learn and follow the 2-2-2-6-12 Program.
- Win over key decision makers.
- Create value-added services and programs.
- Customize programs to address the specific needs of SEGs and Community Business Partners.
- Lean programs and initiatives to build relationships.
- Discover touch points that strengthen relationships.

## **Strengthen Partnerships to Support Your Business Development Program**

- Establish the role of a Business Development Steering Committee.
- Engage Business Development Champions.
- Effectively partner with Branch Operations.
- Build relationships with external resources.
- Utilize the power of communication.

### **Increase Penetration with SEGs and Community Partners**

- Champion a cause to partner with your SEGs and Community Business Partners.
- Differentiate between community involvement versus participating in community events.
- Target the right community events for the greatest ROI.
- Attract potential SEGs and members at community events.

### **Discover the Most Effective Approach to Measure, Track, and Communicate Success**

- Create goals that focus on critical success factors (CSFs) of credit union.
- Develop action plans that help you achieve goals.
- Activity reports that track results and goals
- Create benchmarks.
- Communicate successes.

### **Open Doors, Overcome Objections, and Get Past Gatekeepers**

- Develop an impactful elevator speech.
- Create hook statements and questions that open doors.
- Utilize the 3 Ps to create a cold-call strategy that works!
- Get past gatekeepers.
- Secure appointments and commitments.

### **What Credit Union Professionals Say About cuStrategies:**

*As a new CEO inheriting an institution that had struggled with service, lending, and growth, Celeste really helped me to set us on track. Her flexibility in designing an appropriate training program was key to our success. Celeste provided us with the tools necessary to consistently see above loan growth and help our members save money! We will forever be partners of cuStrategies.*

- Chad Rzewnicki; CEO, Dover Federal Credit Union

*I found all of cuStrategies' topics were areas we had been working on, but needed assistance to take us to the next level in providing exceptional member experience. Celeste worked with us to customize a training program that met our needs. Celeste's passion and expertise brought out the best in our entire team. Since we have completed our training sessions, our team members are more confident in speaking with members, and we have seen an increase in referrals.*

- Emily Roberts; COO, People Driven Credit Union

*We partnered with Celeste for her Credit Score Analysis program. The information we learned gave our employees the tools to work with our members to dramatically increase their credit score. We were able to increase loans, save members money, and build stronger relationships. Celeste lives the credit union mantra of 'people helping people.'*

- Michael Patterson; CBO, Horizon Federal Credit Union

*"The best money I ever spent"*

- John Douchet; CEO, Mobiloil Credit Union



cuStrategies provides tools to engage, educate, and empower your team for continued success, and elevate the performance of your credit union.

Contact Celeste today if your goals include:

- Dramatically enhancing your loan portfolio and deposits.
- Increasing revenue, and growing net income.
- Developing more engaging, problem-solving employees.
- Increasing loan growth as well as membership growth, engagement and retention.
- Making your credit union more relevant to attract new members and new money; particularly

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