

Organizational Culture Transformation Program

Engage, Educate, Empower, and Elevate!

Overview

Transforming the culture of your credit union doesn't happen overnight. Celeste will partner with you to create a unique blueprint consisting of onsite training, coaching, consulting, strategic initiatives and more. This full-year program is designed to engage and educate your team, and elevate the performance and success of your credit union. The program includes:

A minimum of four (4) one-week onsite visits.

Training programs, chosen by the credit union, customized based on your demographics, product offerings, data, local trends, strategic planning, and more.

Onsight one-on-one staff coaching to reinforce training in real-life experiences.

Resource and reference tools to reinforce and follow-up.

Actions plans to increase manager focus.

Key leadership strategies.

Sales strategies and initiatives focused on employee engagement, loan and deposit growth, member retention and growth, and increased profitability.

Assessment of credit union pricing, processes, procedure, and people with recommendations to increase engagement and elevate success!

Credit unions across the nation have experienced increased loan growth, profitability (increased average loan yield/loan interest income/ROA), membership growth, and employee engagement as a result of implementing cuStrategies full year Organizational Culture Transformation Program.

References provided upon request.

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.



Training Programs Available

Customized training program to fit the specific needs of your credit union. All courses are facilitated onsite, and include training workbooks, job aids, scripts, action plans, tool kits, and other resources. Available courses include:

- Leadership Session with Management: Key Leadership Strategies for Growth
- Leadership Development Program for Managers and Supervisors
- Executive Leadership Coaching Program
- Coaching Up Program for Managers and Supervisors
- Service EXTRAordinaire Program for All Staff
- Leadership EXTRAordinaire Program for All Staff
- Credit Scoring and Analysis (CSA) Program for Lending Staff
- Member Engagement/Sales and Service Program
- Teller Training Program (Referral Program)
- Call Center Training
- Outbound Calling Program
- Loan Recapture Program
- Business Development/Community Engagement Program

Onsite Coaching

Reinforce the skills learned in training with “live” onsite coaching with all staff. This enables the team to practice what is learned in real-life member experiences with observation and immediate feedback provided.

Credit Union Assessment of the 7Ps

Engagement and review with entire staff to assess the operation and success of the credit union’s 7Ps:

- People
- Pricing
- Products
- Programs
- Policies
- Processes
- Procedures

Mystery Shop Program

Tailored Mystery Shop Program to ensure members are receiving the consistent high-level service they deserve. The program includes a customized questionnaire, a reinforcement and accountability tool designed for long-term sustainability.

Credit Union Assessments and Strategies

- Assessment of current credit union pricing, processes, and procedures.
- Recommendations for lending and marketing strategies to increase growth and profitability.
- Recommendations to create benchmark goals for staff.
- Recommendations to create reward program for staff.
- Metric benchmark and tracking strategies.
- Assessment of current lending guidelines with recommendations and tools to price and manage risk.

Strategic Leadership Session

Coordinate with senior management and other key members of the leadership team to review current initiatives and strategize important areas for growth.

Tools and Resources Included with the Organizational Transformation Program

- Training workbooks, job aids, and scripts for all classes facilitated.
- Quick Reference Tool Kit for staff subsequent to training.
- Accountability tools to maximize sustained, long-term performance.
- Action plans to keep managers and staff focused on results.
- Coaching forms to engage staff and maximize performance.

The Organizational Culture Transformation Program includes a minimum of four (4) one-week onsite visits during the 12-month period. This allows us to engage, train, and coach all staff to elevate performance and grow the credit union with quality and profitable loans, increased cross-sell, increased member engagement, increased profitability, and increased ROI.

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

email
cccocook@custrategies.com

phone
404.783.5898

online
custrategies.com

