

Sales and Service Culture Transformation Program

Overview

Creating a dynamic sales and service culture within your credit union doesn't happen overnight. Our Sales and Service program consists of one year worth of training, practice and coaching. This is designed to engage with your staff to create enthusiastic team members, confident in their ability to engage members and build strong relationships, increase quality profitable loans, and grow the credit union.

This one-year program encompasses all of cuStrategies' programs listed below:

Key Leadership Session for Management

Leadership Development Program
for managers and supervisors

Coaching Up Program for managers and supervisors
(Coaching tools provided)

Service EXTRAordinaire Program
for frontline staff and support staff

Credit Scoring and Analysis (CSA) Program
for frontline loan processors/lending team

Teller Training Program (Referral Program)

Call Center Training Program

Outbound Calling Program

Collections Training Program

Business Development Training Program and Consulting
"Live" Coaching in branches and with all trained staff,
reinforcing classroom training in real life experiences (highly
impactful component of program for staff engagement!)

Mystery Shop Program/Questionnaire (Reinforcement and
accountability tool for long-term sustainability)

Credit union consulting services for the 7 P's:
People, Pricing, Products, Programs, Policies,
Processes, and Procedures

Training materials, reference tools, scripts, and more are provided for all staff with these training programs.

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.



cuStrategies is your partner to provide your employees with the tools and resources to become more successful, and improve the performance of your credit union.

Contact Celeste today if your goals include:

- Dramatically enhancing your loan portfolio.
- Growing net income.
- Developing more engaging, problem-solving employees.
- Increasing member engagement and retention.
- Making your credit union more relevant to attract new members and new money; particularly Millennials, Gen Zs, and businesses.

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