

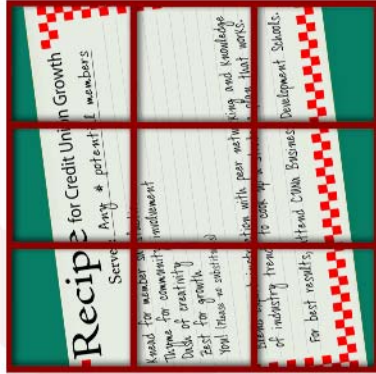


Credit Union National Association

PO Box 431 | Madison, WI 53701-0431



RECIPES FOR SUCCESS
FOR BEST RESULTS ATTEND
2008 CUNA BUSINESS
DEVELOPMENT SCHOOLS



PART I
APRIL 27-MAY 2, 2008
ATLANTA, GA

OCTOBER 5-10, 2008
SAN FRANCISCO, CA

PART II
OCTOBER 5-10, 2008
SAN FRANCISCO, CA

Register at training.cuna.org

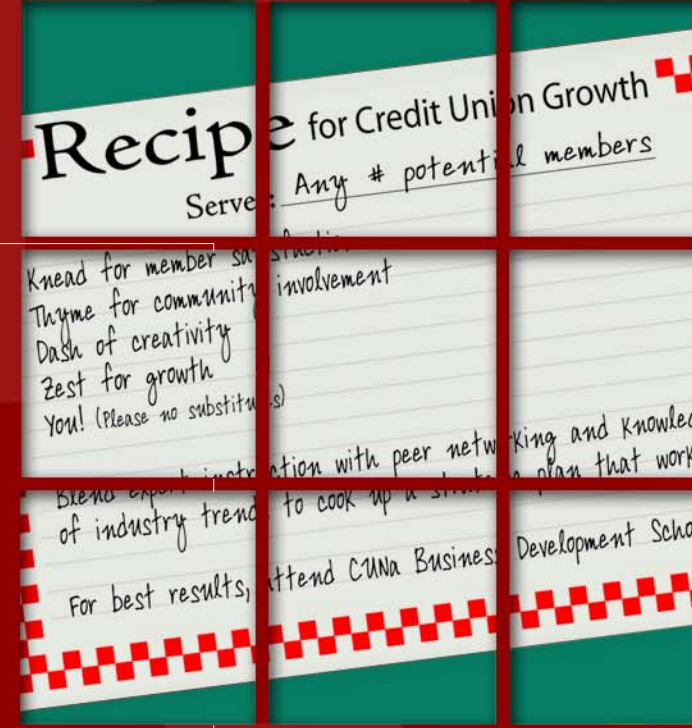
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GET RECIPES
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2008
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Your Trusted Resource





CUNA BUSINESS DEVELOPMENT SCHOOL: PART I

COLLECT RECIPES FOR SAVORY STRATEGIES

Learn how to create a business development program that will help your credit union improve member satisfaction, build repeat business, and achieve superior business performance.

EVERY GREAT COOK HAS A RECIPE UP THEIR SLEEVE

During this credit union business development training program, you'll discover how to create a business development plan, track the results, and manage the growth within your credit union.

WHO SHOULD ATTEND?

Business development staff, branch managers, senior management, and those responsible for the strategic business growth of your credit union or CUSO.

CAN'T ATTEND EVERY DAY?

Customize your training by choosing the day(s) you want for just \$375 per day.

“The speakers presented us with valuable information and strategies that I was able to implement upon return to the credit union. I will, for a long time, refer back to skills and strategies acquired at this conference and keep in touch with those that I met at the conference to constantly improve the business development program at my credit union.”

- Brandon Hays, Community Choice Credit Union

SUNDAY

3:30-4:30 p.m. *Registration*

MONDAY

7:30 a.m. *Networking Breakfast Provided*

8:15-8:30 a.m. *Welcome & Orientation*

8:30-11:45 a.m.

SUCCEED IN CREDIT UNION BUSINESS DEVELOPMENT

- Discuss the competitive environment - banks, brokers, and Wal-Mart?
- Explore how to use the credit union philosophy in business development
- Know how to measure, track, analyze, and adjust your numbers
- Align your business plans with the overall strategy of your credit union

11:45 a.m.-1:00 p.m. *Lunch on Your Own*

1:00-4:15 p.m.

SUCCEED IN CREDIT UNION BUSINESS DEVELOPMENT

(continued)

4:30-5:30 p.m. *Networking Reception*

TUESDAY

7:30 a.m. *Networking Breakfast Provided*

8:15-11:45 a.m.

“SO YOU’RE A CREDIT UNION, NOW WHAT?” — BRANDED BUSINESS DEVELOPMENT TACTICS THAT WORK

- Understand the importance of branding and how to brand your credit union
- Learn the benefits of creating brand ambassadors
- Discuss branding and business development strategies and best practices

REGISTER AT:

training.cuna.org

Enter the code in the Event Finder.
BD1GA08 for April 27-May 2, 2008
BD1CA08 for October 5-10, 2008

11:45 a.m.-1:00 p.m. *Networking Lunch Provided*

1:00-4:15 p.m.

ROUNDTABLE DISCUSSION ON BEST PRACTICES

- Discuss best practices regarding SEG ambassador programs, serving underserved markets, youth programs, financial literacy solutions, community partnerships, working with Hispanic markets, and using technology
- Develop a list of actions to implement at your credit union

WEDNESDAY

7:30 a.m. *Networking Breakfast Provided*

8:15-11:45 a.m.

SUCCESSFUL SEG RELATIONSHIPS

- Discuss strategies to create relationships and define your target groups
- Learn how to differentiate yourself from other vendors
- Communicate with existing SEGs and explore “ambassador” contact tips for building business partners
- Learn how to categorize and quantify SEG visits and events for tracking

11:45 a.m.-1:00 p.m. *Lunch on Your Own*

1:00-4:15 p.m.

FROM PUBLIC RELATIONS TO PARTNERSHIPS: DEVELOPING A COMMUNITY DEVELOPMENT PROGRAM

- Discuss the systems, activities, and expectations necessary to support the community development process within your credit union
- Identify event objectives and strategies, how to gain internal and external buy-in, and define success measurement for your community programs
- Learn how to identify underserved community groups
- Explore ideas for increasing staff involvement

April 27-May 2, 2008 • Atlanta, GA

Tuition: \$1,295 (\$1,395 after March 14, 2008)

October 5-10, 2008 • San Francisco, CA

Tuition: \$1,295 (\$1,395 after August 22, 2008)

THURSDAY

7:30 a.m. *Networking Breakfast Provided*

8:15-11:45 a.m.

MEMBER EXPERIENCE MANAGEMENT

- Gain a better understanding of consumer demographic and behavioral shifts
- Learn how to create a unique experience and sustain a competitive advantage
- Understand the tools and cultural changes necessary to be successful

11:45 a.m.-1:00 p.m. *Lunch on Your Own*

1:00-4:15 p.m.

BUSINESS DEVELOPMENT’S ROLE IN DEVELOPING BUSINESS ACCOUNTS

- Define business services within your credit union
- Identify potential business accounts within your existing membership
- Learn how business loans can build your credit union’s business
- Hear about industry trends and learn how other credit unions are offering member business services

FRIDAY

7:30 a.m. *Networking Breakfast Provided*

8:15-11:45 a.m.

COMMUNICATION STRATEGIES TO ENHANCE THE BUSINESS RELATIONSHIP

- Sharpen your communication skills to ensure effective, quality sales interactions
- Connect with your listener to gain their involvement, attention, and commitment
- Present a credible image and deliver your message in a confident and knowledgeable manner

11:45 a.m.-Noon

WRAP-UP

- Certificates

**Schedule is subject to change.*

100%
GUARANTEE

CUNA Center for Professional Development is committed to providing a quality learning experience with cutting-edge topics and expert instructors. If for some reason you are not fully satisfied, contact us and we'll provide you a full tuition refund or credit.

Experience Learning like never before with CUNA Center for Professional Development. For more than 40 years, we've helped people reach their personal and professional potential to maximize credit union performance. With training designed for credit unions by credit union people, our content is second to none and our business results help credit unions thrive. We deliver expert information, resources, and networking opportunities that inform and motivate staff and volunteers to deliver innovative ideas and exceptional strategies to your credit union. **Guaranteed.**

CUNA BUSINESS DEVELOPMENT SCHOOL: PART II

October 5-10, 2008 • San Francisco, CA
Tuition: \$1,295 (\$1,395 after August 22, 2008)



SPICE UP YOUR CREDIT UNION'S FUTURE

Continue your business development training and learn how to take your business development efforts to the next level by attending CUNA Business Development School: Part II.

SECRET INGREDIENTS TO BUILDING RELATIONSHIPS

Building relationships is the key to success. Learn how to improve member satisfaction and loyalty, increase your role in your community, and introduce legislators to your credit union. You'll hear from industry experts and network with peers to better your ability to serve your members.

WHO SHOULD ATTEND?

Business development managers, sales staff, branch managers, senior management, and those responsible for the strategic business growth and sales functions at your credit union or CUSO.

CAN'T ATTEND EVERY DAY?

Customize your training by choosing the day(s) you want for just \$375 per day.

SUNDAY

3:30-4:30 p.m. *Registration*

MONDAY

7:30 a.m. *Networking Breakfast Provided*

8:30-8:45 a.m. *Welcome & Orientation*

8:45 a.m.-Noon

SUPPORTING & GROWING YOUR BUSINESS DEVELOPMENT PROGRAM

- Build your referral base, one satisfied member at a time
- Develop a calling plan for maximum results
- Discover follow-up disciplines to keep your pipeline full

Noon-1:15 p.m. *Lunch on Your Own*

1:15-4:30 p.m.

POLITICAL INVOLVEMENT

- Understand your role in the community
- Identify and make contact with local, state, and federal legislators
- Learn to communicate the credit union message and philosophy to make the most in meeting with legislators

TUESDAY

7:30 a.m. *Networking Breakfast Provided*

8:30-11:45 a.m.

ACHIEVE BUSINESS GOALS BY OFFERING FINANCIAL EDUCATION TO MEMBERS

- Develop strategies for using member financial education to achieve business goals
- Learn from case studies on what leading companies such as New York Life are doing to educate customers

11:45 a.m.-1:00 p.m. *Networking Lunch Provided*

1:00-4:15 p.m.

ROUNDTABLE DISCUSSION ON BEST PRACTICES

- Discuss best practices regarding SEG ambassador programs, serving underserved markets, youth programs, financial literacy solutions, community partnerships, working with Hispanic markets, and using technology
- Develop a list of actions to implement at your credit union

WEDNESDAY

7:30 a.m. *Networking Breakfast Provided*

8:30 a.m.-Noon

BRINGING IN BUSINESS: MASTERING THE ART OF RELATIONSHIP SELLING

- Learn how to build relationships by focusing on what members want, why they want it, and how they make decisions
- Identify the seven "buying" decision stages of members
- Stay aligned with your member's decision-making process

Noon-1:15 p.m. *Lunch on Your Own*

1:15-4:30 p.m.

BRINGING IN BUSINESS: INFLUENCING THROUGH STORY

- Explore using stories to convey credibility, instill confidence, and build connection with members
- Learn how to use stories to exemplify the value of your credit union
- Tell six types of stories about you and your credit union

THURSDAY

7:30 a.m. *Networking Breakfast Provided*

8:30 a.m.-Noon

DEVELOPING & DELIVERING YOUR MESSAGE WITH CONFIDENCE

- Develop your delivery skills to eliminate distractions, manage nervousness, project confidence, and enhance credibility
- Learn quick and easy techniques for content development and organization using the communication quick start
- Design visuals that support your message

Noon-1:15 p.m. *Lunch on Your Own*

1:15-4:30 p.m.

DEVELOPING & DELIVERING YOUR MESSAGE WITH CONFIDENCE (continued)

FRIDAY

7:30 a.m. *Networking Breakfast Provided*

8:30 a.m.-Noon

NEW GROWTH STRATEGY WITH CURRENT MEMBERS

- Learn business development tactics for growing existing member relationships
- Hear best practices for increasing member profitability

Noon-12:15 p.m.

WRAP-UP

- Certificates

**Schedule is subject to change.*

“You will come away with a new sense of purpose for your business development efforts at your own credit union. There is so much to learn from the presenters and the other attending credit union employees that you get many times your money's worth. The real question is why wouldn't you go?”

- Past Attendee

REGISTER AT:

training.cuna.org

Enter BD2CA08 in the Event Finder.

LEARN

IN THESE EXCITING PLACES!

APRIL 2008 CUNA Business Development School: Part I

THE WESTIN BUCKHEAD ATLANTA
3391 Peachtree Road NE
Atlanta, GA 30326
Phone: 404-365-0065
Fax: 404-365-8787
Reservations: 800-937-8461
Room rates: \$189 single/double*



Hotel Reservation Deadline: April 8, 2008

In the heart of Atlanta's best neighborhood for dining and shopping, The Westin Buckhead is 19 miles from Hartsfield-Jackson Atlanta International Airport and just minutes from area attractions including the Georgia Aquarium.

OCTOBER 2008 CUNA Business Development Schools: Part I & II

THE WESTIN ST. FRANCIS
335 Powell Street
San Francisco, CA 94102
Phone: 415-397-7000
Fax: 415-774-0124
Reservations: 800-937-8461
Room rates: \$239 single/double*



Hotel Reservation Deadline: September 7, 2008

Located in the heart of San Francisco on Union Square, The Westin St. Francis is surrounded by world-class shopping, restaurants, and theatres, with a cable car stop outside the front door. It is a short walk from the financial district and Chinatown, and only 12 miles from San Francisco International Airport and 15 miles from Oakland International Airport.

* Room rates and availability cannot be guaranteed. Rooms may be sold out prior to this date, so make your hotel reservations early! Room reservations and fees are the responsibility of the registrant. To claim this room rate, call for reservations and reference "CUNA" or "Credit Union National Association."

FOR MORE INFORMATION

Visit: training.cuna.org

Program Content:

Call: 800-356-9655, ext. 4249
E-mail: elearning@cuna.coop

Registration:

Call: 800-356-9655, ext. 4400
E-mail: reginfo@cuna.coop

Continuing Professional Education (CPE) Credits

CUNA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site: www.nasba.org



CPE Credits: You can earn 36 group-live CPE credit hours for CUNA Business Development School: Part I and 36 group-live CPE credit hours for CUNA Business Development School: Part II. No advance preparation or prerequisites are required. For more information regarding administrative policies, such as complaint and refund, please contact CUNA at 800-356-9655, ext. 4249.

Council Discount CUNA Council members receive a \$100 discount on select schools and eSchools and a \$50 discount on webinars. To learn more about CUNA Councils, visit cunacouncils.org.

Travel Arrangements United Airlines is the "official airline" for CUNA's programs. Call United's specialized meetings reservation center at 800-521-4041 to make your airline reservations. Please reference ID #553SF.

Cancellations & Refunds Cancellations received in writing (via fax 608-231-4327) seven or more days before the start of the program are eligible for a refund of the amount paid minus a \$200 administrative fee. No refunds will be granted if cancellation is received six days or less before a program begins. Substitutions are accepted anytime prior to the start of the program at no additional cost. Simply fax an updated registration form, listing the new participant and who they will be replacing.

MORE 2008 CUNA TRAINING & RESOURCES

SCHOOLS & CONFERENCES

CUNA MARKETING MANAGEMENT SCHOOLS: PART I, II & III

June 8-13, 2008 — Seattle, WA
Tuition: \$1,295 (\$1,395 after April 25, 2008)

CUNA MARKETING & BUSINESS DEVELOPMENT COUNCIL CONFERENCE

March 16-19, 2008 — Nashville, TN

BOOKS

BUSINESS DEVELOPMENT SERIES:

COMMUNITY CREDIT UNIONS

#22895-BR9
\$29.95



ELECTRONIC SERVICES

#22894-BR9 \$29.95

SEGS

#22896-BR9 \$29.95

BEST VALUE!

BUSINESS DEVELOPMENT SERIES Three-Book Set

#F23329-BR9 \$79.00

WEBINARS

More than 15 marketing and business development webinars offered each year including:

- Building & Branding Your Credit Union's Social Mission
- Best of the 2008 CUNA Marketing & Business Development Council Conference: Business Development
- Best of the 2008 CUNA Marketing & Business Development Council Conference: Marketing

CAN'T ATTEND? Register for the archived (recorded) version to view the webinar at your convenience.

REPORTS & SURVEYS

CUNA 2007-2008 BUSINESS SERVICES SURVEY REPORT

This valuable report is for credit unions currently offering or thinking about offering member business services. It provides an in-depth look at how other credit unions are operating, competing, and serving the needs of their member business owners.



#27615-BR9

\$269 print version

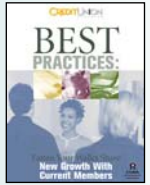
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\$239 PDF version

CREDIT UNION MAGAZINE BEST PRACTICES REPORT: FATTEN YOUR WALLET SHARE: NEW GROWTH WITH CURRENT MEMBERS

Nine fast-growing credit unions discuss their strategies for obtaining a greater share of members' wallets through organic growth — that is, due to factors other than mergers.

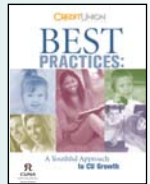
#27922-BR9 \$64.95 print version
#27922P \$49.95 PDF version



CREDIT UNION MAGAZINE BEST PRACTICES REPORT: A YOUTHFUL APPROACH TO CU GROWTH

How do you attract generation Y and younger consumers? Offer products and services customized for different age groups.

#27826-BR9 \$64.95 print version
#27826P \$49.95 PDF version



DISCOVER WHAT POTENTIAL MEMBERS WANT AND NEED FROM YOUR CREDIT UNION

A *Community Charter Survey* offers you critical marketing information on demographics, awareness of your credit union, and how to attract new members. You'll guide your strategic planning decisions with an understanding of your competitors' strengths and weaknesses, and what it will take to build your membership. Visit advice.cuna.org and choose *Custom Research* or call 800-356-9655, ext. 4172.

INCREASE RESULTS & MAXIMIZE YOUR RESOURCES

As you seek to attract and retain members and drive credit union growth, we're here to help you get results. CUNA provides a variety of resources to help you maximize your business development efforts. We offer expert research, ready-to-use promotional materials, professional development opportunities, and more! Visit buy.cuna.org and choose *Marketing & Business Development*.



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