

CREATING  
MEMBER  
LOYALTY™  
SYSTEM OF TRAINING



*Assuring consistency of message and methodology*

# Trainer Certification

**The trainer certification process prepares a designated credit union employee to effectively and confidently lead training within the Creating Member Loyalty™ (CML) System of Training.** Each certification session is program specific and provides the content clarity, practice, and one-on-one coaching to ensure consistent delivery and proven results. The opportunity to experience the content as both a “Participant/Learner” and as a “Trainer/Facilitator” during the session provides additional perspective and prepares your trainer to be an effective role model for all program behaviors.

Trainer Certification Sessions are offered for the following programs:

- **Service Strategies: Staff and Management Programs**  
(5 days)
- **Sales Leadership Strategies**  
(5 days)
- **Sales Strategies: Core Program and Referral Program**  
(5 days)
- **Sales Strategies: Advanced Program**  
(5 days)
- **Call Center Sales: Building the Member Experience**  
(½-day teleconference)

■ For information about how to bring this training system to your credit union, visit [training.cuna.org/cml](http://training.cuna.org/cml), call 800-456-0543, or e-mail [cml@cuna.com](mailto:cml@cuna.com).



Credit Union  
National Association

## LEARNING OBJECTIVES

Each certification session is designed to help your trainer:

- **Effectively** use the training tools provided in the program
- **Create** a preparation process to assist with program launch
- **Gain** insight into potential staff reactions and challenges to the program
- **Practice** handling likely participant reactions and challenges constructively
- **Demonstrate** the programs skills (as a role model) while training
- **Learn** and practice specific behaviors that will facilitate staff buy-in
- **Identify** training strengths and future-focused development areas

## TRAINER CERTIFICATION PROCESS QUALITY ASSURANCE

The requirements to receive a recommendation of “certification” include the ability to:

- **Demonstrate** a clear understanding of the program content
- **Demonstrate** effective use of program skills and trainer skills
- **Recognize** skill use in others and provide effective feedback

At the conclusion of the session, each trainer receives a recommendation about their readiness to present the program, plus an individual development plan identifying personal strengths and areas for future development.

## POST-SESSION SUPPORT

- **Peer networking** with other certified CML trainers throughout the country is quick and easy through the CML e-mail list at no additional cost.
- **Webinars** specific to CML program use and for continued trainer development are available throughout the year.
- **An annual user workshop** offers continued development, networking with peers, and best practice exchange.
- **Telephone coaching** and consultation from CML master trainers and sales consultants at no additional cost.
- **On-site support** can be arranged at any time and includes training managers and/or staff, coaching trainers and/or managers, and trainer follow-up assessment. Co-training is available to assist with initial program launch activities and to support specific credit union objectives throughout the year.

## SMALL GROUP SIZES

The certification sessions are limited to a maximum of five participants. A small group size ensures each participant receives personalized coaching from the master trainer and multiple opportunities to practice and apply the training skills learned throughout the session.

## EACH TRAINER CERTIFICATION SESSION INCLUDES

- Pre-session consultation with the master trainer
- Full set of program trainer’s guides and participant materials for program
- DVD with video/audio examples and exercises for training
- Implementation guide for the program launch
- Evaluation tool kit for pre/post-training measurement
- Five-day classroom training and in-class materials (1/2-day for Call Center session)
- Written and verbal feedback and coaching on classroom performance
- Shipping of all trainer materials to your credit union