

Creating Member Loyalty™ System of Training

Product Knowledge

Developing product fluency.

CREATING
MEMBER
LOYALTY™
SYSTEM OF TRAINING



Your Trusted Resource

Product Knowledge

A systematic approach to learning your credit union's products and services

This software enables you to efficiently customize more than 60 product profile templates to match your credit union's products and services. The templates include approximately 80% of the profile data, which allows you to quickly complete your customized product knowledge manual by simply editing the data.



Your staff will learn clear and consistent information about each product which they then apply in conversational, team-building exercises and activities. This simple combination of information + practice develops your staff at a manageable pace. It also promotes ongoing team

discussions around how to exceed member expectations in today's competitive marketplace.

THE PRODUCT KNOWLEDGE SOFTWARE PROVIDES:

- **Systematic** approach to learning about your credit union's products and services
- **Consistent** information received by all staff
- **Focus** on products in terms of member needs
- **Profiles** of products in a way that reinforces the selling skills needed to present them
- **Tools** to enable staff to recognize opportunities to provide additional service to members

KEY FEATURES AND BENEFITS

- Customize your product manual with easy-to-use software
- Easily update product information for product manual "maintenance"
- Increase employees' confidence in discussing your products
- Expand member relationships through cross-selling effectiveness
- Cross-train new and existing staff systematically — when they need it
- Ongoing reinforcement and training of products and services
- Affordable investment: only \$1,725

A SIMPLE AND CONSISTENT PROCESS

PREPARE

- 2-3 months

Customize the product profiles and product manual (Member Needs Handbook) using software provided

Establish a 6- to 12-month schedule to focus on 2-4 product profiles per month

Distribute product profiles (Member Needs Handbook) to all staff via Intranet or in paper manual format

TRAIN

- 30 minutes
- Bi-weekly
- 6-12 months

Assign product profiles for all staff to study based upon your established schedule

Use Team Leader's Guide to create agendas for Product Sales Meetings including quizzes, games, and activities

Team leader(s) conduct fun, engaging 30-minute product sales meetings that involve staff in using what they have studied

PROGRAM CONTENT

Member Needs Handbook

The Member Needs Handbook contains sales-focused profiles of credit union products, written to develop and enhance the sales and service skills of your staff. The handbook is very useful as a reference to ensure all employees communicate consistent product information to members. The handbook contains:

- What the product/service is and what it does
- Who is eligible
- Product features and member benefits
- Need identification questions
- Questions, objections, and possible responses
- Cross-selling opportunities
- Presentation helpers

Team Leader's Guide

This guide may be used by supervisors to conduct sales meetings with their staff. In general, this guide contains:

- Outlines for 26 sales meetings (30-minute meetings)
- Tips on conducting effective meetings using adult learning principles
- Exercises, quizzes, and games to reinforce both product knowledge and selling skills

Project Outline, User Notes, and Instructions

A booklet which outlines the details of each manual and provides guidelines for editing and services.

Software

This software enables you to efficiently customize 60 profile templates to match your credit union's products and services. The templates include approximately 80% of the profile data. This allows you to complete your customized version by simply adding to and editing the data.



Credit Union National Association

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Product Knowledge

The Creating Member Loyalty™ System of Training provides research-based training and consulting customized for credit unions and is designed to increase organizational and individual sales effectiveness. Credit unions throughout the U.S. have successfully integrated this training to improve sales, service, and sales leadership within their organizations.