

## 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.