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PEP
Personal Excellence Program

Catalog of Training Courses

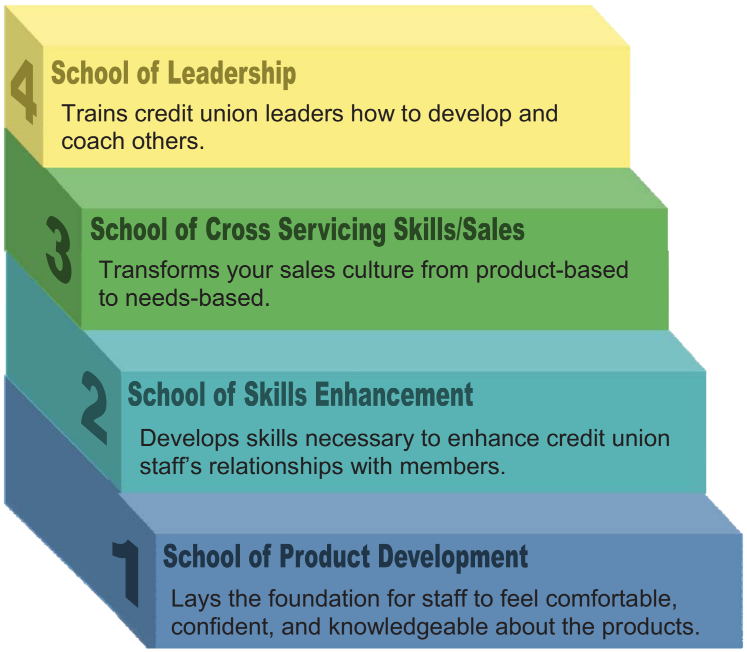
provided by

cri solutions

Overview

Efficiency Meets Results

Our goal is to help you keep your staff knowledgeable and comfortable with our products and services, so they will be motivated and confident in providing services to your members.



We believe that the thematic approach we employ will always achieve the highest quality of measurable results.

When our training is coupled with management support, the impact on staff productivity and profitability are boundless.

Catch a Smile If You Can

Overview

In this exciting session, participants are exposed to basic member service principles This session uses fun audience based participation to help your entire staff understand that a smile can be all it takes to deliver outstanding internal and external member service.

Hospitality Mentality

Overview

This class is intended to change a good customer service mentality into an excellent member service reality. Participants will learn how to provide consistent excellent member service by applying much of the same etiquette and good manners they would demonstrate while hosting a friend in their home.

Solid Gold Service Standards

Overview

In this session, participants are exposed to what members really want from their credit unions, service. This class helps your credit union staff understand the tenants of delivering outstanding member service. Participants are exposed to how they can deliver the gold standard to your members and their co-workers.

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Designed specifically for large groups, the following sessions can be delivered to your entire credit union staff. If you are in need of a credit union wide training seminar for an upcoming staff development day these sessions could help take your staff's member service skills to the next level.

Custom Training Curriculum

Our training programs help your staff through the transition from reactive order takers to financial service consultants, specializing in product recommendation and needs fulfillment. Our training curriculum is customizable and scalable to meet the demands and needs of even the toughest cases.

Bringing Technology to the Classroom

All of our training modules can be delivered through an in-person classroom oriented process or by using the highly interactive WebEx® internet-based E-learning software.

In addition, some of our classes are also available online through our innovative eLearning University. These interactive courses are available to your CU staff 24/7, so that they can learn whenever it is most convenient for them.

Product Development

Presenting Payment Protection*

Overview

This program is designed for new lending staff or as a refresher course for experienced loan and service representatives. This class teaches credit insurance product knowledge, the value of credit insurance for both members and the credit union, and presentation skills, with emphasis on using member-friendly insurance terms. This program lays the foundation for any successful credit insurance program!

Disability Protection: Who Needs It?

Overview

This program is specifically designed to provide your employees with a comprehensive overview of your state's Workman's Compensation package. A detailed evaluation of claims frequency and diagnosis are provided so your staff can analyze your credit union's members and the history of those suffering disabling injuries.

Debt Protection: Knowing Your Product*

Overview

This module is intended for staff who are new to the Debt Protection product or as a refresher course for experienced loan and service representatives. This class introduces the fundamental concepts of Debt Protection, recognizing that Debt Protection is still relatively new to the credit union industry. The course focuses on features and benefits of the product as well as presentation techniques.

This course is available through our interactive online university.

Establishing Effective Leaders

Overview

In this session we will begin setting short and long term goals on how to become effective leaders. Each participant will be exposed to the qualities of effective and ineffective leaders. Each individual will internalize the qualities necessary for promoting and establishing themselves as an effective leader. It is here where the culmination of the credit union's hard work will be put to the test.

Building Positive Relationships

Overview

This class will help participants identify ways to build trust with co-workers and managers in order to build more positive relationships at work. They will also identify and implement the process of redirection and praise responses.

Leadership

Team Building for Success

Overview

In this session participants will define team building and how it can benefit the credit union. We will identify the components of successful and unsuccessful teams. Each participant will be provided with a four-step process to help build a healthy team concept. We will discuss how to create and maintain team synergy. Participants will be provided with the tools necessary for monitoring and enabling your teams to succeed.

Maximize Your Employees' Performance and Potential

Overview

This course emphasizes the importance of setting expectations for managers and supervisors. Expectation-setting techniques are modeled for the individual employee as well as the department. By the end of this class, participants will have a working understanding of the role of expectation-setting in being a successful manager.

Change Management: Wedges of Change

Overview

Based on the popular "Who Moved My Cheese" series, by Dr. Spencer Johnson, the concept of change and why we fear it will be discussed. Participants can expect to have their beliefs about change analyzed and evaluated. Individuals will be asked to identify their own notions about change and why it is often feared. Participants will be involved in setting goals and following the goals set by the credit union. The focus is about allowing change to permeate the credit union's corporate culture.

Debt Protection: Enhancing Your Presentation

Recommended Prerequisite

Debt Protection: Knowing Your Product

Overview

Although this module can be taught without a prerequisite course, it is a great follow-up to "Debt Protection: Knowing Your Product." This module is intended to identify the challenging areas of product presentation and suggest tools and techniques for meeting those challenges.

Home Equity Protect

Overview

While Home Equity Protect is a Debt Protection Product, the provisions are specific enough to merit its own block of instruction within our product knowledge curriculum. For those who are familiar with Debt Protection products, this course will allow them to focus on the parameters particular to Home Equity Protect. Meanwhile, if Home Equity Protect is the participant's first time dealing with Debt Protection products, the class is constructed to provide a general understanding of Debt Protection benefits, features, and presentation tips.

Product Development

Are You On Target?

Overview

This course takes a highly interactive approach towards the importance of offering credit insurance. The audience is directly involved in games, an in-depth analysis of what it takes to be successful and a scenario evaluation on common member characteristics.

Guaranteed Asset Protection 101: Knowing Your Product*

Overview

This program is designed for new lending staff or as a refresher course for experienced loan and service representatives. This class teaches GAP protection product knowledge, the value of GAP for both members and the credit union, as well as presentation skills.

Guaranteed Asset Protection 201: Enhancing Your Presentation

Recommended Prerequisite

GAP 101: Knowing Your Product

Overview

Participants in this session will build upon the insights gained from the GAP 101 module. We will focus on what our competition offers, how to determine a member's GAP, and presentation techniques.

This course is available through our interactive online university.

Coaching: Conducting Your Own Coaching Sessions

Recommended Prerequisites

Coaching: Getting Ready for Coaching
Coaching: Performance Coaching in Action

Overview

In the final session of our coaching trilogy participants will explore how to conduct individual coaching sessions. Participants will be exposed to the guiding principles that successful job coaches use on a daily basis.

Effective Communication & Feedback

Overview

Feedback is essential in the art of becoming effective job coaches. In this session participants will be exposed to the concepts of being effective communicators. Each individual will learn the tips and techniques to communicate better in their personal and professional lives.

Sales Management

Overview

In this session participants will learn the skills necessary to motivate staff while managing sales at the branch level. Participants will identify what makes employees happy, how to motivate staff beyond incentives, and identify the five steps to success.

Leadership

Coaching: Getting Ready for Coaching

Overview

In this session participants will be introduced to how to become effective job coaches. Each manager will be trained on how to recognize the importance of being a job coach. Each individual will be tasked with the concept of learning the differences between coaching, mentoring, and counseling. Each person will be instructed on how to bring the best out of their staff on a daily basis. Each participant will receive a diagnostic test that will help uncover their natural coaching strengths and help identify any areas of inconsistency.

Coaching: Performance Coaching in Action

Recommended Prerequisite

Coaching: Getting Ready for Coaching

Overview

This coaching session is session #2 and helps participants build on the core skills they learn in "Getting Ready for Coaching." Participants will be exposed to the principles that help enhance a formalized coaching program as well as the mechanisms that help their people navigate the steps necessary to establish break through thinking. Participants also work on developing their own coaching competencies.

Vehicle Service Contract Orientation

Overview

This program is designed for new lending staff or as a refresher course for experienced loan and service representatives. This class teaches auto warranty product knowledge, the value of auto warranties for both members and the credit union, as well as presentation skills.

Vehicle Service Contract for Experts

Recommended Prerequisite

Warranty Orientation

Overview

Participants in this session will build upon the insights gained from the Warranty Orientation module. We will focus on the benefits of offering warranties, exclusions, cancellations, and presentation techniques.

Skills Enhancement

Developing a Healthy Attitude
Part 1

Overview

This course is designed to empower staff on all levels with the tools to positively influence their environment each day. By learning to distinguish between healthy and unhealthy attitude characteristics and the methods for fostering a healthy one, participants can enhance their emotional and physical well-being.

Developing a Healthy Attitude
Part 2

Recommended Prerequisite

Developing a Healthy Attitude, Part 1

Overview

Participants in this session will build upon the insights gained from part one of the Healthy Attitude module. With a focus on preventing or solving burnout-related issues, staff members will learn how to make the most out of each workplace interaction to the benefit of not only themselves, but also the members and co-workers in their environment.

Leadership Strategies Series

Overview

In these sessions participants will be introduced to competency skills of effective leaders. Participants will take a diagnostic test that will help uncover their strengths, opportunities for personal growth, and leadership styles. We will differentiate between characteristics of managers and leaders. We will identify the principles of leadership as well as learn the different combinations of approaches that would work best in given situations using the primary leadership frameworks.

Corporate Professionalism

Overview

Maintaining professionalism is essential for effective managers. In this session managers will be exposed to the concepts of being professional in a variety of business settings.

Project Management

Overview

In this session participants will learn the necessary skills to managing various projects including work breakdown structures (WBS), identifying main constraints, prioritizing risks, identifying stakeholders to a project, and phases to complete a project from start to finish.

Leadership

Additional training geared toward the credit union management team is available to any credit union wishing to take their community to the next level.

These sessions are specifically designed to enhance the skills of credit union leadership in developing, encouraging, and coaching others.

Our experienced trainers will work with you to create a leadership training plan customized to enhance your business. Some of our most popular Management Courses are outlined in this catalog.

Please contact your CRI Solutions representative for information on the cost of the School of Leadership training packages.

Harvesting Member Needs

Overview

This program is designed to educate staff on the principles behind needs-based selling as well as the sales cycle that is fundamental in effective needs-based selling. The program also examines various member life phases and recommends cross-servicing strategies for each.

Telephone Lending

Recommended Prerequisite

Presenting Payment Protection

Overview

This module is uniquely designed to assist loan officers who do most of their lending over the phone. Participants are shown how to overcome the unique obstacles they face over the phone and how to present the benefits of Payment Protection in an effective way.

Cross Servicing Skills

Preferred Communication Styles
Promoting Sales Success
(formerly "Establishing Immediate Rapport")

Overview
This session will address ways for participants to initially establish positive rapport with their members. By making a positive first impression and applying the steps discussed, participants are shown the path to providing excellent member service!

Mastering the Art of Listening

Recommended Prerequisite
Preferred Communication Styles Promoting Sales Success

Overview
Building on "Preferred Communication Styles Promoting Sales Success," this module provides participants with the necessary steps to actively listen to their members' needs. By listening effectively to their members, participants are shown how it benefits both the credit union and the members by building stronger relationships and increasing cross-servicing opportunities.

Successful Communication:
Professional Standards for Phone, Email and Other Technology Vehicles

Overview
This course teaches participants how to be most effective with contemporary non-face-to-face business communication media. Focusing on phone, email and other communication technology, participants will become familiar with today's communication standards and will explore how to maintain a professional face with technology created to eliminate face-to-face business.

C r o s s S e r v i c i n g S k i l l s

Confronting Your Own Sales Roadblocks

Recommended Prerequisite
Obliterating Objections

Overview
In this session participants are exposed to the largest objection of all, their own self image when it comes to offering products and services. Participants explore the universal sales roadblocks that can hold even the most seasoned veteran or new sales professional back from achieving true sales success.

Missed Sales Opportunities

Overview
This course is unique in its approach to helping your front line sales and service professionals recognize, diagnosis and uncover the often hidden product indicators that can help lead to sales success. Participants are exposed to the various unconscious clues that members often give off before a sales transaction even begins.

The Power of Questioning

Recommended Prerequisite
Mastering the Art of Listening
Preferred Communication Styles Promoting Sales Success

Overview
This course teaches participants the fundamentals of asking effective questions. Effective questions are the root of successful service and by mastering this skill, the credit union and members benefit tremendously!

There Is an "I" in Team

Overview
Participants will discover how they are individually accountable for the success of a team by learning how to be open minded, share responsibility and diffuse conflict and misunderstanding. Participants will partake in multiple role-play scenarios and discuss how the lessons from each parallel to the workplace.

Maintaining Professionalism Under Pressure

Overview
This program is designed to help participants address conflicts with members in professional and effective ways. Participants are taught the two most common reactions to conflicts and how to avoid these reactions while providing exceptional service to their members.

Cross Servicing Skills

Colleagues in Conflict: Part 1

Overview

This course is designed to teach staff how to recognize and effectively communicate with different personality types, so that they may avoid misunderstandings and conflicts. The course also offers different ways to diffuse conflict if avoidance fails.

Colleagues in Conflict: Part 2

Overview

In this class participants will be able to apply best practices for carrying out effective communication strategies for specific conflict styles identified in "Colleagues in Conflict: Part 1". Participants will also view interactive situations in which each conflict type could be applied.

Hospitality Mentality

Overview

This class is intended to change a good customer service mentality into an excellent member service reality. Participants will learn how to provide consistent excellent member service by applying much of the same etiquette and good manners they would demonstrate while hosting a friend in their home.

Obliterating Objections

Recommended Prerequisite

Presenting Payment Protection
Identifying Payment Protection Needs

Overview

This program is designed to help loan officers address some of those commonly presented objections such as "I have insurance through work." By focusing on the members' unique needs and the value of Payment Protection, participants are taught the skills to present Payment Protection and address and obstacles that may come their way.

Time Is on My Side

Overview

This program is designed to provide staff with the tools necessary to manage time and increase productivity. Participants will examine work habits and psychological influences that create challenges to successful time management. There is also an in-depth look at the most common time management tools, demonstrating how and when to use them. Participants will enhance their ability to work more efficiently.