



Your Strategic Partner for Growth

cuStrategies One-Year Program

Introduction

cuStrategies' One-Year Program is designed to offer credit unions customized onsite training and reinforcement training along with onsite coaching of staff needed to instill a strong sales and service culture with a focus on loan growth, profitability, and member loyalty/retention for long-term sustainability. Credit unions across the nation have experienced increased loan growth, profitability (increased average loan yield/loan interest income/ROA), membership growth, and employee engagement as a result of implementing cuStrategies One-Year Program. References provided upon request.

cuStrategies One-Year Program Overview

**Sales...Service...Lending...Business Development...Leadership Development
Training...Knowledge...Skills...Strategies...Programs...Coaching
Reinforcement Training...Empowerment...Accountability...Sales Initiatives
Performance Improvement Program...Rewards and Recognition Program**

The One-Year Program includes, but may not be limited to, the following:

- **A minimum of four one-week onsite visits within a one-year period**
- Classroom training for staff based on the programs selected below
- Onsite one-on-one coaching with staff to reinforce training in real-life member experiences: Frontline staff; Lending; Collections; Business Development, etc.
- Reinforcement training as needed throughout the one-year period
- Training manuals and scripts
- Reference Tool Kit to be used by staff subsequent to training
- Resource tools to support training programs
- Accountability tools
- Metric benchmarks and tracking strategies
- Key sales strategies and initiatives for employee engagement with a focus on increased loan growth (direct loans), profitability, and membership growth
- Recommended lending and marketing strategies for growth that have been PROVEN to increase loan growth and profitability through quality profitable loan opportunities

cuStrategies' Programs

Programs available for you to choose from to incorporate into your customized One-Year Program based on your specific needs:

- **Key Leadership Session for Management: Key leadership strategies for growth**
- **Credit Scoring and Analysis (CSA) Program for lending team; frontline loan processors and new accounts staff; and Collections Team**
- **Teller Training Program (Includes Loan Recapture and Referral Program)**
- **Collections Training Program**
- **Business Development Training Program and Consulting**
- **Onsite Coaching: "Live" Coaching in branches and with all staff trained to reinforce classroom training in real-life member experiences (highly impactful component of program for staff engagement!)**
- **Loan Recapture Program**
- **Call Center Training Program**
- **Outbound Calling Program**
- **Leadership Development Program**
- **Coaching Up Program**
- **Mystery Shop Program/Questionnaire (Reinforcement and accountability tool for long-term sustainability)**
- **Credit union consulting services for the 7 P's: People, pricing, products, programs, policies, processes, and procedures**
- **Training material, scripts, reference tools, sales strategies, etc., are provided**

You can select any of the programs you would like to incorporate for long-term sustainability. Agendas for each program will be provided upon request.

The one-year program is the most cost-effective approach to transform your credit union into a dynamic sales and service culture with enthusiastically engaged staff confident in their ability to engage members and build strong relationships, increase quality profitable loans, and grow the credit union for long-term sustainability.

You can choose one day of training, one week of training, or one year of training. However, below is the benefit of the One-Year Program if you want to TRANSFORM your credit union into a for long-term sustainability!

Pricing Discount of \$10,000 per week!*

Limited availability for this program.

Call today to make sure you get the dates you prefer!

***One-Year Program (minimum of 4 weekly onsite visits within one-year period): A discount of \$10,000 per weekly visit for a total savings of \$40,000!**