

Common Sense Solutions

Teresa Allen



CREDIT UNION TRAINING PROGRAMS

CUSTOMER SERVICE:

Member Conflict: Opportunity Knocks!

Member Conflict can signal the end of your relationship with a member or the beginning of an even stronger relationship! In this highly interactive program using music and role plays, Teresa shows participants how to:

- ♦ Differentiate between Institutional and Transactional Complaints
- ♦ Respond to Varied Levels of Member Anger
- ♦ Handle Complaints Originating from Credit Union Error, Member Error, Policies, and Regulations
- ♦ Avoid Conflict by Catering to Varied Member Personalities

Making Lasting First Impressions

First impressions are the life blood of the credit union. This entertaining and informative seminar opens with a skit titled "Once IS Enough" starring your staff! Participants will learn how to:

- ♦ Make Members Feel Welcome
- ♦ Avoid Credit Union Lingo
- ♦ Recognize Sales Opportunities
- ♦ Project a Positive Attitude
- ♦ Establish Rapport
- ♦ Provide Lagniappe Service

Credit Union Telephone Skills

Telephone contact with credit union members is on the rise. Participants will learn valuable telephone skills:

- ♦ Effective Greetings
- ♦ Speaking Clearly and Concisely
- ♦ Questioning Skills
- ♦ Listening Skills
- ♦ Handling Telephone Conflict
- ♦ Recognize Sales Opportunities

SALES:

Branch Manager Sales Workshop: 10 Sales Mini-Sessions for Your Branch!

This workshop will allow managers to launch an on-going sales training program within their office. The positive result will be a continuous strong sales effort at the branch, directed and continually monitored by a manager who now has the skills and tools necessary to coach his or her team to higher sales performance levels. Program includes a 50 page trainer's manual for the manager, complete with reproducible handouts to take back to the branch!

- ♦ Knowing Your Competition
- ♦ Selling to Seniors
- ♦ Questioning Skills
- ♦ Credit Card Selling
- ♦ Features & Benefits
- ♦ Selling CDs/Share Certificates
- ♦ Handling Objections
- ♦ Easy Cross Sells
- ♦ Closing Techniques
- ♦ Selling From the Loan Portfolio

The Art of Asking Questions: Your Key to Credit Union Selling

Build the sales skills of your credit union through this highly interactive workshop where platform sales personnel practice the skills they are learning through numerous exercises and role plays. Areas covered include those listed above.

Selling From the Loan Portfolio

Cross sell training in the credit union often focuses only on the deposit side. In this unique seminar, your lending personnel will discover the wealth of cross sell opportunities in the loan portfolio documents:

- ♦ Personal Financial Statement, Credit Application, and Credit Bureau Report

Please contact us for a list of keynotes and breakout programs perfect for your credit union conference or meeting!



About Your Presenter . . .

TERESA ALLEN

Common Sense Solutions

Teresa Understands Credit Unions!

Why hire someone who gives the same presentation to your credit union as they give to the corporation down the road? Credit unions are unique and face special challenges and opportunities!

Formerly an Account Executive and National Trainer for Clarke American, Teresa called on 8 to 10 banks and credit unions a day for three years, covering a 14,000 square mile territory. **Teresa now shares her bank and credit union experiences and observations with your staff; large credit unions, small credit unions, regional and national bank competitors, community bank competitors, large bank & credit union competitors, small community bank and credit union competitors; successful sales and service institutions as well as banks and credit unions with very weak sales and service efforts.**

Teresa has molded her sales and service credit union training programs around her observations of what worked and what didn't work in the real world. Credit union staff members across the country express their appreciation for Teresa's understanding of their day-to-day environment!

Teresa also offers consulting services to your credit union. She frequently arrives the day before your program to visit your branches. She is then able to discuss her observations of your sales and member service efforts with management and emphasize areas of greatest need in the training program the following day.

Comments on Teresa's Credit Union Training Programs:

"I wanted to thank you for the entertaining and informative presentations you held for our chapter. I've received nothing but praise from those who were present. Some said yours were the best seminars they've *ever* attended. Thank you for two incredibly enjoyable evenings!"

"Your session rated a 9.7 out of 10. This excellent evaluation, in addition to all of the positive comments we received, proved your presentation to be a success!"

"Thank you for the wonderful presentation to our Management Team and Board on *Creating a Sales Culture*. You were a hit with our staff the following day in the *Member Conflict* seminar! I look forward to the day we can have you back to speak to us again.