



Common Sense Solutions

Teresa Allen



CREDIT UNION PROGRAMS

MEMBER SERVICE:

Common Sense Member Service!

Based on Teresa's best selling book, *Common Sense Service: Close Encounters on the Front Lines*, this program is the perfect motivational jump start for your staff training day or credit union chapter or league event. Learn the positive or negative spin that results from any close encounter with a member and see how to vault service to a new level in a fun and interactive format. Ask about a copy of the book for each of your attendees! (sponsor inserts available)

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 members of your group! 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

Expectations: Meeting 'Em & Beating 'Em

Is your credit union meeting member expectations? Are various departments meeting each other's expectations in order to best serve your members? This highly interactive program with huge take-aways for member contact staff and back office as well as management is the perfect learning event for an all staff training day!

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 trainer's manual for the manager, complete with reproducible handouts on a flash drive to take back to the branch!

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



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!

Comments on Teresa's Credit Union Training Programs:

Teresa's presentation style was very personable and interactive. Our meetings start at 8:00a.m. and last all day. She kept everyone's attention throughout the day with her materials and also with her openness to the staff. She is very intuitive when it comes to dealing with people and used that to her advantage in her presentation style and also in her one-on-one dealings with staff members. Teresa also initiated role playing, games and quizzes which helped drive home the points she was making in each stage of her presentation. She shared personal stories of people in the service industry. Because these were actual examples, the staff could relate and apply these techniques in their daily interactions with members. Our goal is to "excel in service to our members". Teresa's presentation and materials helped each staff member provide Gold Service Standards and reacquainted them with their original enthusiasm at being a member of the credit union.

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 on service and cross-selling really helped us look at how we can continue to improve and focus on developing our relationships with our members. Our managers rated your session a 4.5 out of 5.0, which is absolutely outstanding!

Your session rated a 9.7 out of 10. This excellent evaluation, in addition to all of the positive comments we received, proved your member service 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.*

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When you NEED Credit Union Expertise and you WANT fun!

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