



22+ YEARS OF EXPERIENCE SERVING CREDIT UNION MEMBERS THROUGH SALES



"If your employees aren't selling to your members, they are not truly serving your member's needs." -Nick Brown, CEO

# A Credit Union-Specific Sales Training Program

SalesCU delivers practical and proven sales techniques and strategies that will actually work at your credit union. With over 21 years of frontline member service, training, selling and leadership experience in the credit union industry, the SalesCU team has the knowledge and sales skills your team needs to succeed in the new credit union culture of selling. This program actually works because it combines training for member-facing employees with training for sales leaders at all levels. These credit union-specific programs help employees sell your credit union's full product line and leaders to coach and inspire their team to sales greatness.

## MEET OUR TRAINER

**Nick Brown**  
Senior Trainer  
President, CEO



## What We Believe!

At SalesCU, we believe that selling is critical to the success of any organization, especially credit unions. Our goal is to:

Empower credit unions to cultivate primary financial relationships with their members through sales.

EMPOWERING CREDIT  
UNIONS TO CULTIVATE  
PRIMARY FINANCIAL  
RELATIONSHIPS WITH  
THEIR MEMBERS,  
THROUGH SALES.

Credit unions are retail sales organizations. As such, they must compete for their members' business. The best way to compete is with a sales-enabled approach to member services. To accomplish a sales-enabled approach, team members need to be able to connect with members and engage them in meaningful conversations that align product and service solutions to the member's needs, wants and dreams. Credit unions must have employees who know how to sell in a way that adds value to the member and leaders who are empowered to drive results and development through coaching and meaningful accountability.



## Training Program at a glance

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The first month after SalesCU trained our branch sales staff was great, the next month was exceptional. Every month since then has just gotten better and better.

Outstanding program! After getting our employees trained utilizing the techniques from SalesCU, our team achieved an impressive \$7 million dollars in recaptured loans!

I have had sales training in the past but nothing like this. SalesCU made selling so easy and natural. Really, anyone can do it.

Brittany Anderson,  
VP of Marketing,  
AMUCU

Ken Boteler  
CHRO,  
Highmark CU

Marianna,  
Sr. Branch  
Manager

# Credit Union Sales INTENSIVE



## Day 1

### Sales mindset, processes, and skills

- Why and how to sell in the credit union way
- How to SURPASS our member's expectations
- Seeing the next best opportunity
- Asking great questions to learn more
- Conducting natural sales conversations
- Creating commitment and proper follow-up

## Day 2

### Advanced sales processes and skills

- Managing sales objections
- The four goals of the member interview
- Capturing the full opportunity through up-selling and cross-selling
- Selling assurance products (GAP, Extended Warranty, Debt Protection)
- Loan recapture

## Training Schedule:

- ✓ Each workshop is structured to host both those attending the first two days only and those participating in all three days.
- ✓ Regularly schedule workshops are hosted virtually over Zoom Meetings, and include participants from multiple credit unions across the country.
- ✓ The workshop is hosted during the week on Tuesday, Wednesday, and Thursday.
- ✓ Each day runs a total of five hours, which includes a lunch break.
- ✓ Start and end times will vary based on the time zone your team member is participating in but is completed during normal business hours.
- ✓ Private workshops can be scheduled and conducted at the credit union's facilities or virtually.

Day 3

## Transformational Leadership

- Committing to your role as a coach
- The 4-part sales coaching process
- Conducting one-on-one sales coaching
- Using the four coaching styles to drive development
- Creating natural accountability

### Who should attend all three days of the workshop?

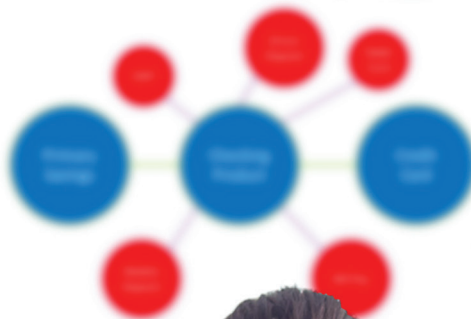
All team members who lead sales teams such as branch, lending and contact center leaders; senior leaders who oversee these teams and trainers

“ This is a fantastic workshop!

I learned so much more than I expected. It doesn't drag on like other workshops. Nick and the SalesCU team do a wonderful job of keeping everyone engaged and making everyone feel comfortable, and the workshop is packed with great information that naturally flows! ”

-Meaghan Baker, Eagle One FCU,  
Branch Manager

### Selling The Full Product Line





## Videos

Videos are fun, engaging, and to the point. Most videos are four minutes in length but cover skills or steps in a process that can be applied right away.

## Worksheets

Worksheets provide employees the opportunity to apply or record what they just learned with additional learning elements that increase retention and comprehension.

## Assignments

Performance doesn't improve unless learning is applied. The assignments will reinforce learning and are coaching resources for leaders.

## Examples

Learning comprehension is never perfect. Examples provide your leaders and employees a model to apply the skills and processes in real scenarios.

## Quizzes & Exams

Measure comprehension and understanding of the concepts trained in this program. Exam scores are tracked and reported to training administrators.



The SalesCU online sales training program contains 14 courses which are customized to your sales positions:

### Course tracks for tellers, lenders and contact center team members:

- Credit Union Sales Philosophy
- The SURPASS Sales Process
- Communication 101
- Product Mapping
- Creating the Product Profile
- The Simple Offer
- Managing Sales Objections
- Commitments, Referrals and Proper Follow-up

### Advanced Sales Skills:

- If/Then Commitments
- The Member Interview
- Aligning Solutions to Member Needs
- Selling Assurance Products
- Loan Recapture
- Onboarding

# Train the Trainer Certification Program

Send your training team members to the SalesCU Sales Trainer Certification Program and start training Sales and Sales Leadership at your credit union!

For your credit union to experience consistent sales results, you must have a trained staff and leaders capable of maintaining engagement, accountability and results through consistent coaching and reinforcement. In this Certification Program, your trainer will be equipped to train both!

## 6 DAY CERTIFICATION PROCESS:

- The 4-day, In-Person, Credit Union Sales Intensive Trainer Certification
- The 2-day, Virtual, Transformational Leadership Trainer Certification

## PROGRAM INCLUDES:

SALES INTENSIVE  
AND  
TRANSFORMATIONAL  
LEADERSHIP  
PROGRAM  
CERTIFICATIONS



PROGRAM  
LICENSING FOR  
ONE YEAR\*



TWO  
PRE-CERTIFICATION  
CALLS WITH OUR  
MASTER TRAINER



TRAINING  
MATERIALS FOR  
FIRST 10  
PARTICIPANTS\*\*



\*Annual licensing renewal

\*\*Workshop materials will need to be purchased for each additional participant.

## YOUR TRAINERS WILL BE CERTIFIED TO TRAIN:

01 Teller Sales

02 Contact Center Sales

03 New Account Sales

04 Lending Sales

05 Sales Leadership

06 Sales Coaching

