

Effective Credit Write-Ups

Develop credit write-ups that streamline the lending decision process



INSTRUCTOR-LED
WORKSHOP

1
DAY

OVERVIEW

This customized workshop uses training materials developed from your organization's own case studies and best practices to teach participants how to develop high-quality credit write-ups that ultimately expedite the approval process. Participants analyze both exemplary and substandard write-ups to identify strengths and weaknesses. Then, participants learn to develop clear, effective write-ups, using your organization's preferred format, style, and content.

WHO SHOULD ATTEND

Anyone involved in the loan approval process, including lenders, relationship managers, portfolio managers, credit analysts and underwriters, loan review staff, and credit trainees.

RESULTS AND BUSINESS BENEFITS

Upon completion, participants will be able to:

- Prepare professional, audience-focused credit write-ups that result in a more efficient approval process
- Clearly communicate the borrower's strengths and weaknesses, strategies, and operating performance
- Convey the borrower's level of risk and mitigating factors
- Deliver a meaningful analysis of the opportunity

LEARNING TOPICS

1

Credit Write-Up
Basics

2

The Components
of an Effective
Credit Write-Up

3

Writing an
Effective
Recommendation



INSTRUCTOR-LED WORKSHOPS BY OMEGA PERFORMANCE

Since 1976, Omega Performance Instructor-Led Workshops have consistently set the global standard for high-impact credit training. Today, we continue to provide highly engaging workshops, many of which are designed to complement our suite of self-paced online courses. These immersive workshops involve independent work as well as collaborative team activities that simulate real-world interactions with colleagues as loan case challenges are identified and solved.



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