

Advancing Member Connections

Strengthen conversations to support member retention while sustaining profitability



SELF-PACED
E-LEARNING

1-2
HOURS



SKILLS
APPLICATION
LAB

1
DAY

OVERVIEW

This program, which includes a self-study e-learning course and an immersive Skills Application Lab (SAL), gives participants the skills to expand the credit union's relationships with its members and proactively address members' financial needs. The e-learning course builds foundational knowledge necessary for participation in the SAL. During the SAL, participants practice a proven method for expanding connections with members and proposing solutions to their current and future needs.

WHO SHOULD ATTEND

This course is for sales and service associates and their managers. In order to take the SAL, participants must pass the e-learning course with an assessment score of at least 80%.

RESULTS AND BUSINESS BENEFITS

Upon completion, participants will be able to:

- Expand member relationships, providing a competitive advantage
- Demonstrate the behaviors that enhance connections with current members
- Implement planning tools to prepare for follow-up calls and meetings with members
- Apply Omega Performance's *Handling Objections* model when a member is reluctant to schedule a follow-up meeting
- Develop an action plan for on-the-job skill application and growth

LEARNING TOPICS

1

Building on
Member
Connections

2

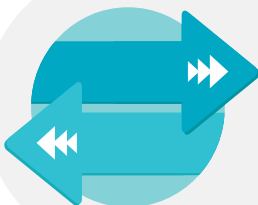
The
Initial
Conversation

3

The
Confirmation
Call

4

The
Follow-up
Meeting



BLENDED LEARNING BY OMEGA PERFORMANCE

The Omega Performance blended learning experience helps participants learn critical skills, deepen comprehension, and improve on-the-job skill application and sustainment. Self-paced E-Learning courses present learning objectives and enhance understanding in a highly-interactive online environment, while in-person, instructor-led Skills Application Labs (SALs) provide participants with the opportunity to collaboratively apply skills to real-world cases.

MOODY'S
ANALYTICS

omega
performance

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