

Building Member Connections

Drive targeted conversations that align members' needs with appropriate products



SELF-PACED
E-LEARNING

2-3
HOURS



SKILLS
APPLICATION
LAB

2
DAY

OVERVIEW

This program, which includes a self-study e-learning course and an immersive Skills Application Lab (SAL), equips participants to interact with members in a way that addresses their financial needs, strengthens relationships, and improves member satisfaction while increasing sales. The e-learning course builds foundational knowledge that is necessary for participation in the SAL. During the SAL, participants prepare for and practice member conversations in small groups, and receive comprehensive feedback on what they do well and where there are opportunities for improvement.

WHO SHOULD ATTEND

Anyone who interacts with members, including member service representatives, branch managers, sales and service associates, and universal tellers. 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:

- Engage in member interactions that differentiate an organization in the marketplace
- Increase member satisfaction, retention, and loyalty
- Improve lending results at the individual and team levels
- Increase products per member/business, cross-sell ratios, and sales growth

LEARNING TOPICS

1

Connecting
with the
Member

2

Gathering the
Right
Information

3

Handling
Objections

4

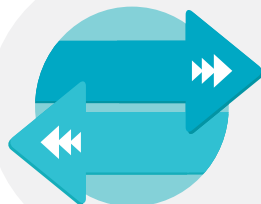
Matching
Member Needs
to Products and
Benefits

5

Explaining
Solutions

6

Completing
the Process



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

LEARNING SOLUTIONS

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