


# Creating Member Connections

Initiate exceptional member conversations in order to make effective referrals



**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 ensure members have a positive experience and that they make connections that ensure a long-lasting relationship with your organization. The e-learning course builds foundational knowledge that is necessary for participation in the SAL. During the SAL, participants learn to hone-in on satisfying the strengths of members through a proven member experience model that starts with the importance of a personal connection and extends through the process of securing referrals.

## WHO SHOULD ATTEND

This course is for tellers and teller coordinators. In order to take the SAL, participants must pass the e-learning course with an assessment score of at least 80%.

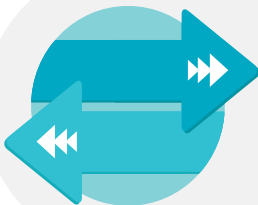
## RESULTS AND BUSINESS BENEFITS

Upon completion, participants will be able to:

- Create an exceptional member experience by making a personal connection with members
- Enhance member experiences that differentiate your organization in the marketplace
- Build and ensure long-term loyalty
- Increase the number and quality of referrals to partners in the branch and other lines of business

## LEARNING TOPICS

- 1**  
Connecting with Members
- 2**  
Asking Effective Questions
- 3**  
Expediting the Member's Request
- 4**  
Identifying Need Cues
- 5**  
Making Effective Referrals



## 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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