

# 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.

Moody's  
ANALYTICS

omega  
performance

## LEARNING SOLUTIONS

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