



ONBOARDING FOR IMPACT

The 5-week virtual onboarding program is designed to equip newer business development employees with essential skills and knowledge for relationship-building, promoting financial well-being, and understanding the foundational principles of business development in the credit union movement.

This program targets both SEG-focused employees and those responsible for community collaborations.

- Confidently represent the credit union by building trust and rapport in SEG and community engagements.
- Articulate the credit union's unique value proposition with clarity and adaptability.
- Transform challenges into opportunities by applying innovative problem-solving techniques tailored to partner needs.
- Foster long-term, mutually beneficial relationships with SEG and community partners.
- Strengthen cross-departmental collaboration to drive shared goals and measurable impact.

EMPOWERING BD CHAMPIONS | 5 WEEK VIRTUAL PROGRAM



THE CU DNA - WHY BD MATTERS

- Explore the "people helping people" philosophy and its relevance to business development.
- Understand the importance of being the go-to resource for financial well-being.
- Discuss building affinity and how BD roles drive impact.

CRAFTING YOUR VALUE STORY

- Understand different audiences.
- Tailor messaging for SEG decision-makers and community partners.
- Deliver with impact in both Business-to-Business and Business-to-Member situations.

DISCOVERY CONVERSATIONS

- Learn about the priorities and pain points of SEGs and community partners.
- Unlock the power of active listening to uncover opportunities.
- Build trust by demonstrating genuine interest and follow-up strategies.

PROBLEMS TO POSSIBILITIES

- Craft innovation solutions utilizing tools at your credit union that align with financial well-being.
- Present effectively to gain a high level of support and engagement.
- Leverage data and insights to position the credit union as a problem-solving partner.

STRONGER TOGETHER

- Foster a growth culture of collaboration across departments and teams at your credit union.
- Strengthening connection with branch teams, marketing, and leadership.
- Share metrics that matter and celebrate collective successes.

THIS ONBOARDING PROGRAM IS DESIGNED FOR:

Employees recently stepping into business development roles, branch managers expanding into community and SEG relationships, and employees looking to grow into a BD role, with an emphasis on professional development.

TIME COMMITMENT:

9AM PST. Each session includes 60 minutes of instruction, with up to 1 hour of self-paced exercises between sessions. Must be present to participate, sessions will not be recorded.

PEER COLLABORATION | FACILITATED LEARNING | VIRTUAL DELIVERY

THIS EVENT IS HOSTED BY:



Julie R Ferguson, CUDE

julierferguson.com
julie@jrfconsultingservices.com

\$995 PER PERSON

Register: Email Julie
julie@jrfconsultingservices.com