



# FALL 2025 ONBOARDING FOR IMPACT

This five-week virtual onboarding program is designed to equip newer business and community development employees with foundational knowledge, practical tools, and insights they need to quickly make an impact – building meaningful relationships, championing financial well-being, and representing the credit union movement with purpose.

- 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

SESSION  
**01**

SEPTEMBER 24

### 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.

SESSION  
**02**

OCTOBER 1

### 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.

SESSION  
**03**

OCTOBER 8

### 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 showing genuine interest and effective follow-up.

SESSION  
**04**

OCTOBER 15

### PROBLEMS TO POSSIBILITIES

- Shape solutions that align with financial well-being and meet real needs.
- 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.

SESSION  
**05**

OCTOBER 22

### STRONGER TOGETHER

- Foster a culture of growth across departments.
- Share metrics that matter and celebrate collective successes.
- Turn connections at SEGs and in the community into advocates and promoters.

## JOIN US TO GROW YOUR IMPACT

Who you are:

- Business Development
- Community Development
- Financial Well-Being Leader
- Branch Manager
- Influencers of Impact

## TIME COMMITMENT AND ATTENDANCE:

Each session begins at 8:30 AM PST with 60 minutes of interactive instruction, plus up to 1 hour of self-paced exercises between sessions. If you miss a session, one individual 1:1 make-up can be arranged.

PEER COLLABORATION | FACILITATED LEARNING | VIRTUAL DELIVERY

THIS EVENT IS HOSTED BY:



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**\$995 PER PERSON**

Register: Email Julie  
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