

SUMMER 2026



EMPOWERING BD CHAMPIONS ONBOARDING FOR IMPACT THE FOUNDATION OF GROWTH

A five-part virtual series designed for new business development and community development professionals ready to build employer and community partnerships, share the credit union story in meaningful ways, deliver measurable results, and grow their credit union with confidence.

PURPOSE JULY 13

- Bring “people helping people” to life
- Understand how BD and community roles expand access to financial well-being
- Think like an entrepreneur inside your credit union

SESSION 1

VALUE JULY 20

- Clearly articulate your credit union’s value
- Communicate confidently with employers, members, and the community
- Align messaging for consistency and credibility

SESSION 2

INSIGHT JULY 27

- Lead discovery conversations that uncover real needs
- Identify communication channels to connect with future members
- Find and engage the right champions within organizations

SESSION 3

OPPORTUNITY AUGUST 3

- Turn outreach into partnership
- Use data to focus effort and guide strategy
- Build processes to manage outreach and relationships

SESSION 4

MOMENTUM AUGUST 10

- Share impact and growth results with partners
- Use storytelling to increase awareness
- Mobilize teams across the credit union

SESSION 5

TIME COMMITMENT & FORMAT

- Five weekly virtual sessions
- 75 minutes live (9:30 AM PST / 12:30 PM EST)
- Up to one hour of applied exercises between sessions
- Peer collaboration and facilitated learning
- One individual 1:1 make-up session available if needed

WHO SHOULD ATTEND

- New Business Development Professionals
- New Community Development Leaders
- Branch Leaders with external growth responsibilities
- Financial Well-Being Champions
- Emerging growth influencers across departments

Can't make every session? You're still covered.

One individual make-up session is included for every participant.



Julie R Ferguson, CUDE
julierferguson.com
TheBDNowchannel.com

\$995 PER PERSON

Register: Email Julie
julie@jrfconsultingservices.com