2017 Member Service Representative Virtual Conference

November 27, 29 & December 1, 5, 7, 2017

Each day begins the same. You arrive at the branch, note the all clear sign, and walk through the doorway. You are sure today is going to be the day you finally get to the bottom of your very long TO DO list. By mid-morning you're wondering where time is going, and hoping that maybe you'll get to that list sometime tomorrow. Sound familiar?

Today's branch, and the member service role, is ever evolving. Members know more and expect more. As service professionals, we have access to more information, learning and development so we CAN help them.

This year's Member Service Representative Virtual Conference is all about finding your personal efficiency. Learn how effective referrals can build deeper relationships and buy you time. Equip yourself with questions and knowledge that helps you build strong member relationships. Hear examples of questions that have worked for others'. Learn how to make your member interactions effective on the phone or when connecting with members through a virtual channel. You have the power to make the most of your day, starting now.

Register for the bundle by November 22!

CCUA Canadian Credit Union Association
cuSource™ Professional Development and Education

WEBINAR DESCRIPTIONS

Strong Referrals Leading to Stronger Member Relationships

SESSION #1

Everyone needs financial products and services. To receive direct deposit from your employer—you need an account. To drive off the lot with a new car—you need a loan, a savings account, or a cheque. To purchase something online—you need electronic services. To save for retirement—you need investments. To protect against loss—you need insurance. You get the idea. So why is it difficult to start financial conversations? Maybe you're afraid you won't have all the answers. Maybe you're afraid the member won't want to talk about it. Maybe it's just easier to talk about something else. Ultimately who is missing out? As MSRs it's our job to start those conversations and get members in front of the people who can help them achieve their financial goals. Financially fit members help ensure a financially fit community and a financially sound credit union.

NOVEMBER 27, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Key Learning Points:

- Understanding how referrals help a member achieve their financial goals
- Understanding the role MSRs play in identifying product and service needs
- How much business our members are doing with other FIs

Asking the Right Questions to Build Strong Relationships

SESSION #2

Wouldn't it be nice if members would list all their product and service needs on their deposit slips? "Withdrawal $60 and I need a student loan." "Transfer funds to my savings account and I'm turning 71 next year and am not sure what to do about my RRSP." "I'd like to pay $200 on my credit card and I'm really worried about how high the balance is." If only our members' needs were that transparent. In reality, the needs are always there, but are often unspoken. Asking the right questions and listening for clues from our members is the best way to help your member alleviate their stress and achieve their financial goals. Join subject matter expert, John Ferguson, to see how the right questions can get you the right answers.

NOVEMBER 29, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Key Learning Points:

- Common financial stages and needs
- How to ask open-ended questions
- How to ask questions about products you're unfamiliar with

WEBINAR DESCRIPTIONS

Inflation, High Debts, the Economy - Oh My!

SESSION #3

DECEMBER 1, 2017
1:00 - 2:15 PM ET

REGISTER NOW

"Loonie pares this week's gains as oil falls, greenback rises." "Threat from housing, high debts still growing." "What has to go right for the economy before BoC hikes rates." These are three recent headlines from The Globe and Mail—Report on Business. Which financial headlines normally catch your eye? How do you stay up on financial news? How do you use those headlines to build stronger relationships with your members? As an MSR, before you can provide financial guidance to your members, you need to understand what's going on in the world of finance. Those same headlines that cause your eyes to glaze over are the ones your members are worrying about. Join subject matter expert Peter Bellworthy as he walks us through which financial headlines we should be watching, and how we can use them to build relationships with your members.

Key Learning Points:

- You're the financial expert
- Headlines that should catch your eye, where to find them
- Responding to a member's inquiry about an economic headline

---

Pick Up the Phone and Build Relationships

SESSION #4

DECEMBER 5, 2017
1:00 - 2:15 PM ET

REGISTER NOW

For many of us, the idea of making phone calls to members, makes us uncomfortable. Why? Is it because we've heard it's difficult? Is it because we're afraid they will ask a question we won't know how to answer? Or is it because we've heard all the horror stories about "sales calls" that we don't even want to try?

Our members expect more! The relationships we build with them tend to center on trust, community and financial wellbeing. These are phone calls they want to receive. You're not trying to sell them something, you're trying to assist them in achieving their goals. As a trusted advisor, you can provide what they need to succeed.

Join Mary Jane Copps - The Phone Lady, author and recognized phone expert, who will provide you with the insight, information, and motivation to pick up the phone.

Key Learning Points:

- What are essential phone skills?
- Understanding & dismantling phone fear and call reluctance
- Powerful words; what you say and how you say it

WEBINAR DESCRIPTIONS

Member Effectiveness in a Virtual World

SESSION #5

DECEMBER 7, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Years ago, members would visit the credit union each week, sometimes more often, to complete their financial transactions. Now, it is estimated that at least half, if not more of our members conduct all their transactions electronically. Many never set foot in the branch. How can you effectively build relationships with members you never see? Working with members virtually can be frustrating. But, if you understand the basics of why virtual interactions are different then they don't have to be difficult. In this session, we'll explore why basic things like accountability and trust are different in a virtual setting. Our subject matter expert will share some easy tactics you can employ to improve your virtual interactions.

Key Learning Points:

- How your role is different in a virtual interaction
- How to build and maintain trust
- Why intention must replace assumption
- Communicating your message (which includes)
- Knowing your audience
- Writing a successful email
- Having an effective conversation
- Following-up to ensure clarity

SPEAKER PROFILES

MICHELLE MANARY

Michelle Manary brings a depth and breadth of knowledge and experience in the areas of organizational effectiveness and strategic human resource management. As the owner of the Manary Group and a partner in ReframeHR, Michelle works with organizations in the areas of strategic planning and board governance, leadership development, organizational design, financial and risk management, systems analysis, stakeholder communications and human resource management. Prior to becoming an independent consultant in 2007, Michelle was a member of the executive management team at Assiniboine Credit Union, responsible for developing HR systems to align with corporate strategies. She also spent a number of years in management at a major national bank.

A life long learner, Michelle has earned her Bachelor's Degree from Brandon University, Business Administration Diploma from Assiniboine Community College, Certificate in Human Resource Management and Certificate in Organizational Development from Queens University, and Certificate in Participative Management from the University of Manitoba. She is also a Certified Master Coach from the Behavioural Coaching Institute.

Since 2007, Michelle has developed and facilitated courses across Canada, on behalf of CUSOURCE Credit Union Knowledge Network.

JOHN FERGUSON

John spent over 30 years working in the financial services industry retiring in early 2006. Throughout those years he served in many capacities – loans & mortgages, small business lending, private banking, international, business development, training and 10 years as an Area Manager overseeing retail banking operations. He has also been teaching part-time at the local College since 2001 delivering management and finance courses. He recently completed a contract for one year at a credit union. He also does a little consulting work with emphasis on strategic planning/visioning and change management.

Born in New Brunswick, he accepted employment in Ontario at 23 years of age and has lived in many locations across Ontario as he advanced his career. He and his family also had the opportunity to live in the Caribbean for 4 years where served as a bank manager. He and his wife Debbie have chosen to make Kingsville, Ontario (on the shores of Lake Erie) their retirement home.

John's education includes an undergraduate degree from St. Mary's University in Halifax, N.S. He has Personal Financial Planning designation as well as the Canadian Securities course. At age 45 he returned to school part-time at the University of Windsor and obtained his MBA. He enjoys training and his greatest satisfaction comes from seeing others succeed.

SPEAKER PROFILES

PETER BELLWORTHY

Peter Bellworthy has a proven record and expertise in coaching, training, sales and change management developed through an extensive and successful career in the banking sector and within the credit union system. Following a successful career with Royal Bank Financial Group where he held management and senior management positions in various locations, Peter moved to the credit union system in 2000 when he joined Credit Union Atlantic as branch Manager of their main Halifax branch. Peter held various positions of increasing responsibility, including Director Human Resources, Vice President Business Development and Vice President Relationship Development & Lending. In this capacity, his responsibilities included the overall direction, growth and profitability of the credit union as well as oversight of the branch network and both the commercial and retail lending functions.

In 2012 Peter formed Credit Union Consulting to assist credit unions with development and execution of strategies, business development, training and consulting needs. Projects to date have included development of FSO and investment training and overseeing branch operations for Eagle River Credit Union at their Goose Bay Nfld location, development and presentation of a national seminar for CUSOURCE Knowledge Network as well as the development and delivery of a mortgage attraction strategy for Bergengren Credit Union.

MARY JANE COPPS

An accomplished author, speaker and facilitator, Mary Jane Copps aims to improve communication at all levels. Her illustrious career found her on the end of the telephone as a manager, a journalist, a salesperson, a researcher and a fundraiser where she sharpened her customer service phone etiquette and interview skills.

Mary Jane has spent 27 years analyzing the psychology of a phone call, information she now shares with entrepreneurs, not-for-profits, corporations and government departments in her mission to improve telephone interactions between businesses and clients (and vice versa!). The Phone Lady also helps her clients deal with their phone phobia and get them on track to becoming effective communicators who turn every phone call they make into lasting business relationships.

All of her clients have one thing in common – they need to clearly and succinctly communicate by phone with both existing and potential clients, customers, donors and sponsors. Whether it is a receptionist taking the call, a salesperson or fundraiser placing the call or a CEO accepting the call, everyone can – and should – improve their existing telephone communication skills.

LYNETTE VAN STEINBERG

As a Virtual Effectiveness Driver, she brings her experience as a leader, educator and transformation specialist to support individuals and organizations in increasing their virtual effectiveness by using strategies and methods that are an amalgamation of nearly 20 years' experience in virtual collaboration with clients, colleagues and leaders. She has worked in the sphere of corporate learning, leadership, and transformation since 1997.

She has experience in leadership, project management, instructional design, development, change management, quality assurance, organizational development, communications and business transformation. Her entire career has included participation in, or leadership of, one or more virtual teams.

In her career, Lynette has been fortunate enough to work with clients like Nike, T-Mobile, CN, BC Hydro, Alpha Technologies, and other world-class organizations in bringing excellence and thoughtfulness to their corporate landscape during times of change.

And, since 2009, she's been doing it all from her home office on her family's cattle ranch in Southeastern British Columbia, Canada. If she can do it virtually, so can you!

REGISTRATION & PRICING

Conference Bundle

Purchase a single seat in all 4 sessions. (Non-transferable, single employee only)

- **Corporate Members - $389 (per employee)**
- **Pay As You Go - $470 (per employee)**

REGISTER NOW FOR BUNDLES

Individual Webinars

Attend as many webinars as you'd like and register for each separately. Use the "register now" links on page 2 or search by title in the Learning Gateway to register.

- **Corporate Members - $79 (per webinar)**
- **Pay As You Go - $95 (per webinar)**

REGISTER NOW

CCUA Canadian Credit Union Association | cuSource Professional Development and Education

For more information or registration assistance, contact Client Solutions:
ccua.com/cusource | 1.888.367.1386 | clientsolutions@ccua.com