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# Accelerating Your Business Services Program

*A.K.A. How to Stop Selling Products and Start Building Relationships*

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Target Audience:

- Business developers (commercial lending and deposits staff, business development officers and branch managers)
  - Sales management (business line managers, marketing managers and senior management)
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Join us for this comprehensive workshop focused on helping your credit union jumpstart its business services program. Learn to better develop a strategic vision and receive guidance on how to do more business with the small business member. Learn about creating a disciplined sales process to identify and convert opportunities with existing small business members and how to more effectively prospect and close new small business opportunities.

CU Business Group will highlight detailed, customized proposals for potential business members which include your credit union's role in helping the business meet its objectives, the benefits of using the credit union's services, options for business product packages and more. Here are the major highlights of the session:

***Critical Success Factors in Establishing and Growing Business Services***

- Leveraging your existing member base to find new opportunities
- Uncovering financial service needs within existing business members and their owners
- Learning to think like small business owners—creating entrepreneurship and overcoming bureaucratic behavior

***Getting Your Staff to Stop Selling Products and Start Building Relationships***

- Identifying key indicators of product focus within your organization
- How to determine if you are really listening to your members (and start listening if you are not)
- How to determine if your members really feel important (and engender that feeling if it's not there)
- How to create differentiation from banks and credit unions that still cling to a product-focused value proposition
- Utilizing a Customer Relationship Management system as a relationship tool

**2010 Course Dates & Times**

**February 23, 2010 9 a.m. to 3 p.m.**

**Endura Financial Credit Union - Minneapolis, MN**

**Course Fee:** \$149 for CUBG Members; \$199 all others  
(lunch included)



Featuring Theodore A. Rosen, President,  
Expert Business Development, LLC

Cancellations within 30 days of the session will be charged a 15% administrative fee. Cancellations within 7 days of the session will be charged 50% of the normal fee. Educational materials are proprietary and will only be provided to conference attendees. For more information regarding administrative policies such as complaint or refund, please contact our office at (866) 484-2876.



## Accelerating Your Business Services Program Course Registration Form

February 23, 2009, 9 a.m. – 3 p.m. – **Endura Financial Credit Union**

820 North Lilac Drive

Minneapolis, Minnesota 55422

*Please complete separate registration forms for each attendee.*

### Attendee Information

Name  Mr.  Mrs.  Ms. \_\_\_\_\_

Title (as it should appear on your badge) \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Office Phone (\_\_\_\_\_) \_\_\_\_\_ Office Fax (\_\_\_\_\_) \_\_\_\_\_

Cell Phone (\_\_\_\_\_) \_\_\_\_\_ Email \_\_\_\_\_

### Attendee Categories and Fees (Please check the appropriate box. Payment must accompany registration.)

CU Business Group Members – \$149

All Others – \$199

### Attendee Payment Information

Credit Card – please choose one  Visa  Mastercard

Check Enclosed

Card Number \_\_\_\_\_ Exp Date \_\_\_\_\_

Security Code (last 3 digits on back of card) \_\_\_\_\_ Billing Zip Code \_\_\_\_\_

Signature \_\_\_\_\_ Total Payment Enclosed / Authorized \$ \_\_\_\_\_

**Cancellations** – All cancellations must be made in writing or via email. Cancellations within 30 days of the program will be charged a 15% administrative fee. Cancellations within 7 days of the program will be charged 50% of the normal fee.

E-mail form to: [education@cubg.org](mailto:education@cubg.org)

Fax form to: 503-230-8857

Mail form to: CU Business Group

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