

EAST COAST REGIONAL TRAINING EVENT 2013

East Coast Regional Training Event 2013 has arrived! This year's unique learning event promises a full day of education brought to you by a team from CU*Answers recognized for their expertise in the credit union industry. Get ready to learn as we forge a path through marketing and sales topics. Take a closer look at the agenda below and plan now to come and absorb the knowledge shared by our experts.

On Tuesday, April 30th the place to be is: CorePlus Federal Credit Union
202 Salem Turnpike
Norwich, CT 06360
860-886-0576 or 1-800-724-0779

Overnight accommodations within walking distance of CorePlus: Holiday Inn <http://www.holidaynorwichhotel.com/>
Entertainment Option: Mohegan Sun Casino Resort is a short drive from CorePlus.

Register here: <http://www.cuanswers.com/education/syllabi/?course=RT.2> **Seating is limited, so please register early!**

- 9:00 am to 10:30 am** **Identifying a group of members through List Generator and Other CU*Base Dashboards for Member Communication** Have you ever wanted to identify a group of members without creating a Query? Have you used the Export option available on many of the leadership dashboards for quick communication? This session will highlight some options available to you and your team for quick communication to the select group of individuals to whom you wish to communicate.
- 10:45 am to 12:15 pm** **Member Connect – Best Practices for Email Marketing**
Whether you are innovating or duplicating what's always worked, technology, audience expectations, and compliance are creating a constantly changing email landscape. Email communication is a cost-effective and personal way to reach both members and new audiences or it can squander your budget. The most creative campaign is useless if it doesn't reach the right audience. Deepen your member relationships and build your brand with email marketing.
- 12:15 pm – 1:00 pm** **Lunch Provided by CU*Answers**
- 1:00 pm to 2:00 pm** **Cross-Sales Strategies (How a frontline team member can use the information at their fingertips to provide great financial service)**
This session will focus on opportunities that your staff has available at their fingertips when interacting with a member. One item of interest may be the designation that a member is a self-service member, or it may be that the member you are currently interacting with does not have ODP. The focus will be highlighting new additions to Phone Operator/Inquiry/Teller that allow your staff to be more educated, but also allow your staff to cross sell tools that will help the member become financially successful.
- 2:15 pm to 3:00 pm** **Sales Tracker**
CU*BASE Sales Tracker completes the framework for your cross-sales program. Sales Tracker creates a powerful tool for following up on member contacts and closing that sale. Work Trackers from Follow Up and work Trackers from Cross Sales to create your own outbound marketing resource with little to no investment. Since one program cannot work effectively without the other, this course is a must-attend event.
- 3:00 pm to 4:00 pm** **Marketing Clubs/Tiered Services/Service Charges/Unique Fee Income Generation Opportunities**
Marketing Clubs and Tiered Services programs set the stage for promoting behavior within your membership that you credit union desires. As members maintain or continue the desired behavior, fee benefits and waivers can be used to thank the member for their continued participation. The focus of this session will be to discuss opportunities within the current programs and how an implementation plan can be devised.

Special Note: Due to the course content, this will not be a hands-on workshop. Please bring your note-taking tools, as there will be significant information to take back to work! We are here to assist you in preparing for this training event. Please contact CU*Answers: 800.327.3478 and ask for Lani Lowing at ext. 179 or Heather Hull at ext. 240.