



LEARNING LIBRARY COURSE DESCRIPTION

ONLINE TRAINING PLATFORM



Library 3.0

Library 3.0 courses are designed to give employees an understanding of how to effectively coach, sell and refer and are assigned to the employee based on their role or position. After gaining the knowledge, employees can learn how to transfer it into skill by means of Skill Development Workshops and Transactional Coaching. Each course is comprised of several modules, quizzes and final assessments.

Course 1

SERVICE EXCELLENCE



Total Runtime – 38:48

TOPICS

- Why outstanding service is so important
- Excellent service is always more than one expects
- How to go beyond the expectations of our members.
- The Seven Elements of Excellent Service

TARGET AUDIENCE

All Employees of the Credit Union

TIME – FOUR MODULES

MODULE 1

Run Time – 5:45 minutes

MODULE 2

Run Time – 8:57 minutes

Quiz for Modules 1 & 2

MODULE 3

Run Time – 3:05 minutes

MODULE 4

Run Time – 21:01 minutes

Quiz for Modules 3 & 4

Final Exam

REFERRAL SALES CHAMPION

Total Runtime – 58:05



TOPICS

- How to quickly identify product and service needs
- How to use the 10-Second Referral Process

TARGET AUDIENCE

Employees who have a responsibility to refer products and services to members but do not have the ability to open accounts. For example, Tellers and Call Center Representatives.

Note: Employees complete either Referral Sales Champion OR Becoming a Sales Champion, but not both.

TIME – FOUR MODULES

MODULE 1

Run Time – 13:14 minutes

MODULE 2

Run Time – 3:54 minutes

Quiz for Modules 1 & 2

MODULE 3

Run Time – 31:28 minutes

MODULE 4

Run Time – 9:29 minutes

Quiz for Modules 3 & 4

Final Exam

BECOMING A SALES CHAMPION

Total Runtime – 100:39



TOPICS

- How to identify product and service needs
- How to ask effective questions
- Benefit selling
- Overcoming objections to products and services
- How to ask for the member's business
- Effective follow up techniques

TARGET AUDIENCE

Sales Manager, Sales Coaches and all employees in sales positions who have a responsibility to offer products and services to members. For example, Member Service Representatives and Loan Officers.

Note: Employees complete either Becoming a Sales Champion OR Referral Sales Champion, but not both.

TIME – SEVEN MODULES

MODULE 1

Run Time – 13:13 minutes

MODULE 2

Run Time – 5:28 minutes

MODULE 3

Run Time – 27:07 minutes

Quiz for Modules 1-3

MODULE 4

Run Time – 14:32 minutes

MODULE 5

Run Time – 22:43 minutes

MODULE 6

Run Time – 8:33 minutes

MODULE 7

Run Time – 7:53 minutes

Quiz for Modules 4-7

Final Exam

COACHING FOR PERFORMANCE



Total Runtime – 103:54

TOPICS

- Characteristics of effective coaches
- How coaching is different than management
- Key behaviors and actions of effective coaches
- Why employees under-perform
- How to identify why an employee is under-performing
- How to coach unwilling behaviors
- How to coach unable behaviors
- How to coach high performers
- How to hold employees accountable for their results and behaviors
- How to effectively change employees from unwilling to willing performers

TARGET AUDIENCE

Sales Manager and Coaches

TIME – TEN MODULES

MODULE 1

Run Time – 11:47 minutes

MODULE 2

Run Time – 13:03 minutes

MODULE 3

Run Time – 10:12 minutes

MODULE 4

Run Time – 4:18 minutes

MODULE 5

Run Time – 14:15 minutes

MODULE 6

Run Time – 11:47 minutes

MODULE 7

Run Time – 16:43 minutes

Quiz for Modules 1-7

MODULE 8

Run Time – 10:31 minutes

MODULE 9

Run Time – 7:58 minutes

MODULE 10

Run Time – 3:20 minutes

Quiz for Modules 8-10

Final Exam

MISSIONAL LEADERSHIP

Total Runtime – 75:46



TOPICS

- How leading to mission develops employee engagement
- The challenge of employee engagement
- How increased engagement increases profitability
- The three key leadership behaviors that create engagement
- The difference in outcome focused and missional leadership
- The key leadership actions to successfully create organizational change and high performance

TARGET AUDIENCE

Sales Manager and Coaches

TIME – FIVE MODULES

MODULE 1

Run Time – 9:08 minutes

MODULE 2

Run Time – 13:53 minutes

MODULE 3

Run Time – 10:11 minutes

Quiz for Modules 1-3

MODULE 4

Run Time – 13:32 minutes

MODULE 5

Run Time – 29:02 minutes

Quiz for Modules 4 & 5

Final Exam

Vertex Management Development

The Vertex Management Development online lessons are designed to give employees an understanding of how to delegate, motivate employees, think strategically, handle difficult conversations and more. After gaining the knowledge, employees can learn how to transfer it into skill through live training sessions online or onsite. After completing both the online lessons and training sessions, your managers will see improvement in their management performance, employee engagement, member service and profitability. Each lesson is comprised of one or more modules and one quiz. While these lessons can be viewed in any order, we recommend completing them in the order they are in below.

Lesson 1

ATTRIBUTES AND SKILLS

Of Highly Effective Credit Union Managers



Total Runtime – 21:09

MODULE 1

Run time – 21:09 minutes

TOPICS

- Attributes vs. Skills
- Attributes and Skills Common Among High Performing Credit Union Managers
- How to Develop Attributes of High Performing Credit Union Managers
- Final Quiz

EFFECTIVE DELEGATION

Total Runtime – 46:21

MODULE 1

Run time – 18:07 minutes

MODULE 2

Run time – 28:14 minutes

TOPICS

- What Delegation Is and Is Not
- Warning Signs One Is Not Delegating
- Why Managers Don't Delegate
- The Process of Effective Delegation
- Final Quiz



TEAM BUILDING

Total Runtime – 57:01



MODULE 1

Run time – 34:34 minutes

MODULE 2

Run time – 17:00 minutes

TOPICS

- Why Mission Matters in Team Building
- Using the G-R-O-W Team Building Model to Create a Great Team
- Resolving the Five Dysfunctions of a Team
- Final Quiz

COACHING FOR MAXIMUM PERFORMANCE



Total Runtime – 98:31

MODULE 1

Run time – 24:29 minutes

MODULE 2

Run time – 40:51 minutes

MODULE 3

Run time – 33:11 minutes

TOPICS

- The Key Behaviors of an Effective Coach
- Defining Coaching
- The Differences in Management and Coaching
- Why and How Coaching is an Important Sub-Set of Leadership
- Four Critical Coaching Behaviors
- Understanding Why Employees Under-Perform
- How to Identify the Cause of Under-Performance
- How to Coach to the Four Respective Performance Types
- Using the Effective Confrontation Model to Redirect an Unwilling/Able Performance Type
- Final Quiz

EMPLOYEE MOTIVATION

Total Runtime – 68:53



MODULE 1

Run time – 28:49 minutes

MODULE 2

Run time – 40:04 minutes

TOPICS

- What is Motivation?
- What is Engagement?
- How is Engagement Different Than “Buy-In?”
- The Impact of Engaged and Disengaged Employees
- The Seven Keys to Creating an Engaging Work Environment
- Final Quiz

STRATEGIC THINKING

Total Runtime – 41:14



MODULE 1

Run time – 13:25 minutes

MODULE 2

Run time – 27:49 minutes

TOPICS

- Why Strategic Thinking is Critical to Leadership Success
- The Strategic Thinking Gap That Exists in Credit Unions and Why It Exists
- The Types of Strategic Thinkers
- The Differences in Strategic Thinking and Strategic Planning
- How Strategic Masters Differ from Strategic Thinkers
- The Three Disciplines of Strategic Masters
- Strategic Thinking Challenges
- How to Become a Strategic Master
- Final Quiz

LEADERSHIP

Total Runtime – 43:22



MODULE 1

Run time – 11:47 minutes

MODULE 2

Run time – 11:34 minutes

MODULE 3

Run time – 08:11 minutes

MODULE 4

Run time – 11:50 minutes

TOPICS

- The Challenge in Leading from The Middle
- Management vs. Leadership
- Why Credit Union Managers Tend to “Over-Manage” and “Under-Lead”
- The Three Leadership Roles of Middle Managers
- The Keys to Implementing Skills Used in the Three Leadership Roles
- Final Quiz

EMPLOYEE ACCOUNTABILITY

Total Runtime – 57:01



MODULE 1

Run time – 34:19 minutes

MODULE 2

Run time – 22:42 minutes

TOPICS

- What is Accountability?
- The Keys to Effective Accountability
- How to Conduct an Effective Performance Meeting
- The Keys to Setting Effective Performance Goals
- Final Quiz

TIME MANGEMENT

Total Runtime – 34:10



MODULE 1

Run time – 34:10 minutes

TOPICS

- The Causes of Many of Our Time Management Issues
- How to Organize and Prioritize Using the Urgent/Important Quadrant Model
- Time Management Hacks From the Best Time Managers
- Final Quiz

CONFLICT RESOLUTION



Total Runtime – 45:55

MODULE 1

Run time – 30:12 minutes

MODULE 2

Run time – 15:43 minutes

TOPICS

- The Primary Causes of Conflict
- The Impact of Fear of Conflict and Why It Is So Prevalent in Credit Union Culture
- What to Avoid in Conflict Resolution
- What to Do in Conflict Resolution
- How to Handle Peer Conflict
- How to Have Difficult Conversations in an Effective Manner
- Final Quiz