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**Credit Union Trainer’s Guide**

**Training Invitation**

Send this training invitation to your staff a few days before the session.

**Q: What new product delivers 5,000 reasons to smile?**

**A: The Save to Win Certificate!**

You’re requested to attend a brief product training session on (date) from (time – time) in (location). We promise this will be the most exciting mandatory training you’ve ever attended!

Save to Win is guaranteed to get our members attention! You’ll want to be prepped and ready to go when they start asking questions.

Please bring a $1 bill to the training. It could be a very rewarding experience! **Include this sentence if you are doing the optional product demo.**:

**Training Checklist**

**Presentation Preparation**

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| --- |
| Make sure you… |
| Fully review all training materials available on the admin site prior to your session |
| Confirm any equipment or connections required for the session |
| Decide if you want to do the optional product demonstration – if so, review script on the next page and get a $25 gift card, cash or an equivalent prize for your session |

**Product Information**

|  |
| --- |
| Customize your… |
| Staff training presentation (areas in red are to be modified for your program) |
| Official Rules, TIS disclosure and Product Reference Sheet |
| Intranet page or location where product info/documents will be accessible to your staff |

**Bring to the Training**

|  |
| --- |
| Trainer bring… |
| This guide and finalized staff presentation with “notes” format on your hard or flash drive |
| $25 gift card or equivalent prize if doing product demo, paper, pens and hat/bucket to put names in |

**Distribute Materials**

|  |
| --- |
| Print, email or post documents for staff… |
| Member FAQs, Account Best Practices and Product Reference Sheet |

**Optional Exercise & Scripts**

Optional engagement exercise: conduct a prize drawing/product demonstration prior to reviewing the staff training presentation.

**Objective:**

The goal of this exercise is to make the experience of winning tangible for the audience and get staff excited to sell the product.

**You will need:**

* A prize or prizes (we recommend something on the order of a $25 gift card, cash or equivalent)
* A method for writing down names to be put into a hat
* A hat, basket or equivalent drawing entry holder

**Process:**

* Have each attendee submit an entry with their first and last name along with a $1 bill.
* Collect all the entries in a hat or equivalent
  + During session, draw a name out of the hat and have the winner come to the front of the room and make a “big deal” out of winning (see prize drawing script below)
  + Next, hand the winner their money back (see prize drawing script below)
  + Finally, hand back everyone else’s money (see prize drawing script below)

**Prize drawing script:**

Winner announced and comes to the front of the room:

* (To Winner) How does it feel to win? What will you do with this prize? Have you won anything before?
* (To Group) Does anyone in the room know this person? How did you feel when he/she won?

After winner ger their money back:

* (To Winner) How does it feel to win a prize without sacrificing your money? Does this make you more likely to keep saving? Would you tell friends or family about your experience?

After group given their money back:

* (To Group) How does it feel to get your money back? What just happened here? Regardless of the drawing outcome, everyone is a winner. This is how the Save to Win product works.

**Exercise wrap-up script:**

The Save to Win account is a share certificate product designed to help members create positive savings habits. Whatever the member deposits, they keep and earn some interest. Plus, the member can win cash prizes. The more they save, the more chances they earn towards winning prizes!

* For every $25 in month-over-month balance increase, the member earns one entry into the monthly and quarterly drawings
* Up to 10 entries per month/30 entries per quarter
* Refer to the Prize Distribution Sheet or visit [www.savetowin.org](http://www.savetowin.org) for the most up to date list of prizes. Here you can also view/download your credit union’s Official Rules for the program.

**Training Follow Up:**

Once your participants leave your training session, their closest and most responsive training resource is your credit union’s intranet or product web page.

**A United Front**

You should work with your credit union’s marketing team to coordinate a “one stop shop” for your front-line staff’s Save to Win information needs.

**Marketing Materials**

Anything that a member would encounter regarding the Save to Win product should be included. You don’t want to put your front-line staff or CEO in the position of having to say that they’re not familiar with what a member is asking them about. Think broadly and inclusively.

**Suggested Marketing Channels:**

* Credit union website
* Online and telephone banking applications
* Member newsletters
* Statement messaging
* Branch merchandising
* Building banners (local ordinances permitting)
* Branch staff “flair”
* Small advertising specialty items such as pens or balloons
* Deposit envelope and receipt messaging
* ATM and/or Call Center on-hold messaging
* Mentions at member education sessions or community events

**Training Materials**

Regardless of how dazzling your training leadership was, it’s unrealistic to assume that people will remember all the important details from your presentation. Consider organizing resources by type such as: Account Opening Process, Forms/Surveys, Product Information or Other Resources. If information is updated, changed, or added, be sure and call attention to that up-front.

Make sure to meeting regularly with staff to review progress and re-engage them. Don’t forget to celebrate with your team when your credit union achieves certain goals or program milestones.

**Location, Location, Location**

Finally, don’t bury your Save to Win resource material two or three layers down in your Intranet. If space on your “front end” is at a premium, consider the prominent placement of a Save to Win logo, with a link to subordinate pages.

Don’t underestimate the power of a link! Make sure you’ve taken advantage of every opportunity to link existing pages to the new Save to Win resource pages. It’s all about relevance and visibility!