



Strategic Solutions

What Clients Say About Our Management Training ...

“Jeanne, accept my thanks and appreciation for the great management team and staff training program just completed for our credit union. I am extremely pleased with our decision to engage your help. The outcome from the training you provided has exceeded my expectations. This doesn’t surprise me as it becomes another successful experience we have had with your firm. Your keen insight into identifying key issues that need to be resolved prior to our training sessions was very beneficial to management. Your input stimulated us to create various improvements in our organizational structure plus recognizing methods to become more efficient. This allowed us to overcome some obstacles that could impede realizing full benefit from the training. The various professional training techniques used and your flexibility provided during our sessions enhanced the outcome for us. In addition to the skills acquired from the training, we were rewarded with some secondary benefits as well. We gained a greater cohesiveness on the management team, and strengthened the camaraderie among all staff. It was rewarding to witness the development of our group as we progressed with the program. I believe this is a direct result of the stimulating and skillful guidance given throughout our sessions. We benefited from your zest for developing the people you serve. I consider this entire program to be instrumental in providing our organization the means for growth and success in today’s marketplace. You can add the United Educators Credit Union to the list of highly satisfied clients benefiting from your services.” – **D. Danielson, United Educators CU CEO**

“I really value the formalized process and tools we now have to measure performance and to get me started in holding people accountable. It has helped me to apply performance management principles I have previously learned. Working with Jeanne was valuable in setting SMART goals and helping me focus on running effective meetings.” – **P. Matthews, Merrimack Valley FCU CEO**

“We’re setting records in the history of this credit union! Our loans alone are up 150% over last January and February combined! Year-to-date for the 1st Quarter, we saw a 200% increase. And the denial rate on loans hasn’t changed. We’re just getting money from members who would have borrowed from the credit union, if asked! Things seem to be real positive with lots of excitement around here. Since your training, our people are saying the right things and talking the right way. When they recommend products and

services, the members are tickled to death to be asked. They say, “Thank you very much,” and even send flowers to the staff in appreciation. Plus, we’ve got referrals up and going, tracking systems in place, and lots of feedback happening. And there’s a lot of excitement as far as sharing success stories with one another. The results ... all branches were 80% to over 100% on all goals for this very first quarter! We’re off and running in the way I wanted to get it going. I’m real happy with it. Thanks for everything Jeanne.” – **Joe Robertson, Our Community CU CEO**

“I found this training so valuable because it stayed entirely focused on the subject and the trainer was prepared and shared tremendous insights into the issues of this particular Credit Union. She herself used all the management skills at each session. This training is something that we can bring back to our departments. It focuses on creating an environment of continuous improvement for our staff – which is very important in our culture.” – **Community America CU managers**

“Jeanne has an excellent understanding of the financial services industry. She is a convincing speaker. Her presentation style keeps the audience’s interest and she is able to relay information effectively. We found Jeanne to be an excellent resource for a variety of training needs. We would certainly use her again ... and recommend her highly to anyone looking for a reliable and professional instructor.” – **K. Cooke, Twin Cities Co-ops CU (Spire CU) Past CEO**

“Very good job! I find my interest is held with your presentations. Thank you! The best part of the program was role playing with (you), the coach, helping to direct my weak areas.” – **Simpson FCU (Our Community CU) branch manager**

“The role playing and coaching provided by the instructor was most helpful. Excellent tools and focus from the instructor. The trainer was right on target.” – **Eastern Financial FCU Mgrs.**

“Jeanne was an important part of our success. We asked her to totally revamp our sales and service culture, to bridge the gap between what the board and executive management team wanted and what was really happening on the front lines. The systems she implemented helped us translate our organizational goals into tasks the staff could understand and buy into. A key part of this was making sales part of each job description and integrating personal sales goals into the review process. This way, each employee knows where they stand and we’re able to identify those who need additional support and training to succeed. We are still using the program Jeanne put into place here, and I feel that its positive impact is due, in large part, to her tenacity and commitment to the project.” – **Paul Parish, Wings FCU CEO**