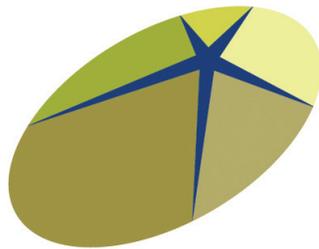




Drive growth
through a better
Member Experience

INSTITUTE OF **STRATEGIC** MANAGEMENT



**INSTITUTE OF
STRATEGIC
MANAGEMENT**

Financial Services Specialists

ISM is a Registered Training Organisation and delivers nationally recognised training. RTO Number 91485.

... the need for CULTURAL CHANGE TO DRIVE GROWTH

**You need more than just training.
You need cultural change
and practical tools to achieve
real results.**

Our strategies are specific and targeted:

- Acquisition of new members
- Customers at risk of leaving
- Current low activity members

With the right strategies at the right time, directed at the right members, we provide your frontline staff with the right skills to retain your current customers and drive growth.

ISM drives cultural change that achieves lasting results. Passive sales approaches are replaced by active relationship management and growth strategies.

Your team will develop new skills, receive practical management tools, learn member management strategies that work, and receive coaching to embed what they have learnt.



...about ISM

The Institute of Strategic Management (ISM) is a Registered Training Organisation (RTO) that delivers training in Financial Services and Business Services. We offer more than just training. We are dedicated to providing a holistic approach to help individuals and organisations reach their full potential.

ISM is focused on becoming the preferred learning partner for individuals and business. It will achieve this by facilitating leading edge training and development programs and providing high quality nationally recognised training.

ISM are Specialists in Financial Services

From our trainers to our resources, we are specialists in financial services and focus on helping you achieve tangible results for your business.

We understand your industry. Our trainers specialise in it, and we tailor our courses to you.

We dislike 'cookie cutter' training as much as you do. If you are going to invest time and money in training, talk to us about how you can get the most out of it. By working together we can make it relevant to your organisation and address topical issues facing your company and industry right now.

Why Are We Unique?

ISM are specialists. We don't just serve up vanilla training to go through the motions. We spend time with you to understand how training can help you achieve your business goals and tailor our training to you.

Our trainers and executives are experts in financial services.

We provide strategic planning, governance and leadership support to many organisations in the financial services industry. We understand your business and training needs.



Why choose ISM

We will help you achieve the results you desire with your training investment.

- We only employ industry experts who have achieved genuine results
- We taught finance brokers the secret to their success and can help you succeed too
- We have developed models and IP with a track record of success
- We are focused on achieving real outcomes, not training for the sake of training
- We have a great track record in helping organisations succeed
- Our staff are incentivised to ensure you achieve a sales uplift

Find out more

Visit our website www.ism.nsw.edu.au or contact us for a free consultation to discuss your business, training needs and funding options.



“ ISM’s Elevate Coaching Program provided our staff with a development program, which was designed to suit each employee’s needs. Our participants were all at different stages of their careers and benefited from one on one coaching which focused on sourcing new business and strengthening the bond with existing customers, leading to invaluable referral opportunities.

We would have no hesitation in recommending this program to any organisation looking to invest in their staff and grow their business.

Jenny Thorman, Member Services Manager, Coastline Credit Union

”

....the process towards CULTURAL CHANGE

1

TRAINING

The MEMBER EXPERIENCE Training Program can be delivered as a non-accredited or accredited program aligned with FNS42015 Certificate IV in Banking Services. Engaging and entertaining training is delivered through a mix of workshops and online content.



2

TRAINING + ELEVATE

In addition to the Member Experience Program, the ELEVATE Coaching Program is a one on one 6 month program of coaching and support delivered in the workplace. It embeds change and enables employees to gain confidence in using new skills. A dedicated coach is assigned to each participant.





3

TRAINING + ELEVATE + STRATEGIC CONSULTING

Training, Elevate and STRATEGIC CONSULTING incorporates support for your team to align and deliver the culture of the Member Experience Program. The support includes: managing portfolios, managing run-off, advanced scripting, detailed outbound strategy through all channels, improved tracking processes and assisting your organisation to deliver consistency in all communications.



“

The Member Experience program goes straight to the bottom line. We focus on growing your portfolios and we do that by increasing your new sales and improving retention rates. We deliver strategic counsel that focuses on both sides of the balance sheet, by providing support when raising deposits inline with a growing loan demand.

Gerard Hermens, Director, ISM

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....and a better outcome

The ISM Culture Change Process

1

Member Experience ...TRAINING

Our Member Experience Program is the first step, and the core structure of our Culture Change Process.

The program is delivered in a series of workshops and can be delivered either combined with a qualification or as a non-accredited program.

Our team delivers workshops across Australia helping limit the time away from work for the participants.

We tailor our delivery of the program to your organisation through an extensive consultation process prior the workshop.

We work with you and your team to prepare for the implementation of the program by reviewing targets, current reporting on performance and set KPIs.

Member Experience includes local area analysis and benchmarking against competitors in addition to tailored outbound strategies.

2

Elevate ...COACHING

Elevate coaching is ISM's dedicated one on one, on-site workplace coaching, and is proven to deliver outstanding, measurable results.

Elevate provides support to your team, which enables them to implement and embed skills learnt though the Member Experience workshop program.

Our team of coaches are highly experienced industry professionals who will design and implement customised strategies and scripting for outbound member contact that are specifically tailored for each participant.

Open communication for additional support between coach and participant is encouraged throughout the program, in addition to the structured sessions.

The Elevate coaching program is fully customisable in duration and number of sessions to suit your organisation's needs.

3

Strategic Support ...REVIEW & ANALYSIS

ISM will provide additional support to your organisation through the culture change, on issues such as:

- Member database; including extracting information, producing health checklists, referral calls, and identification of low activity members.
- Performance Scorecard design and review.
- Help with ongoing measurements of conversion such as prospect to lead, lead to conversion, post settlement and health check strategies.
- Base review and recommendations of the lending processes, including consultation on benchmarks, and reviewing friction points.



“

The Loans Team have increased loans written by more than 270% for the month, over our previous monthly average. The General Insurance Sales Team have received 3 nominations for an upcoming QBE Awards event in Sydney, Sales Person of the Year, Sales Initiative of the Year, and Branch of the Year. There is a very happy team at South West Credit.

David Brown, CEO, South West Credit

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.....the rewards

TEAM OUTCOMES

- Sales focused and skilled staff
- Leverage your database
- Retain your members
- Stimulate referrals
- Generate new leads
- Strong relationships
- Uplift in sales volume
- Reduce member loss
- Formal qualification
- Engage frontline staff in sales campaigns

WHAT YOUR ORGANISATION WILL SEE

ISM will help you develop and embed a culture of success.

Our training, support, tools and coaching enables your whole team to focus on growing your business.

- A positive sales-focused culture embedded
- Measurable sales results supported with regular coaching and follow-up
- A team confident in strategies that work
- A team that is confident in proactively growing your organisation

Your team will learn to:

- Engage with members
- Understand members' life stage
- Add real value to members
- Create memorable experiences that members will share



....results speak
volumes

270%+
INCREASE



how do I find out more?

Contact: Amy Simpson
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