

KEYSTONE

Extra

March 1, 2013

Volume 44 Issue 5

In This Issue:

Page 2

Young Professional Network's
First Meeting

Sales & Service Program for
Credit Unions

Page 3

Synergent Direct
Marketing Services

Convention Countdown:
Grammy Award-Winning
Musician to Deliver
Keynote Message

Page 4

Westwood Receives AAP
Certification

Events Calendar

Managing the Comfort Zone of Volunteers

Millions of people generously give their time, talent, voice, and resources to help strengthen communities and organizations around the world. These volunteers play key roles in addressing the critical issues of our time – from the future of our economy, to education, the environment, and emergency preparedness.

According to *Volunteering and Civic Life in America*, a report released in December 2012, by the Corporation for National and Community Service (CNCS) in partnership with the National Council on Citizenship, the national volunteer rate reached a five-year high in 2011, with almost one in four adults volunteering through a formal organization. Overall, 64.3 million Americans volunteered, an increase of 1.5 million compared to 2010. The 7.9 billion hours volunteered was valued at \$171 billion.

Volunteers play a vital role in guiding credit unions on a path to growth and a successful future. With many board elections currently taking place in conjunction with annual meetings, credit unions will be welcoming new directors and orienting table officers.

With the exception of the top managers, the board has more potential influence on the organizational culture. This is because for strategic and operating purposes, the board must work through its top managers. A board can have influence on culture through direct pathways as diverse as advocacy, member and community relations, and executive management employment.

When the nominating committee seeks new members, it should spend as much time considering the new balance



they would create as they do on board members' skills. The key for credit union management is to anticipate the impact of board members' time, task, and turf comfort zones. The first step is to assess each board member's preferences at the outset of board service and then, with the board chair, try to match their area of responsibility with their styles. This step alone will save time later on by reducing friction points.

The three areas that are most likely to shape board member behavior include:

- Time — the board member's "comfort time zone," i.e., past, present, or future, with ability to focus on the future;
- Task — the kind of work the member is most comfortable doing; and,
- Turf — the natural geographic orientation the member brings, local, state, or national.

continued on page 4

Education & Professional Development

Young Professional Network's First Meeting

On Wednesday, February 20, a group of 12 young professionals from credit unions across the state came to Harrisburg to begin planning a young professional organization for credit union employees in Pennsylvania. Co-sponsored by your Association and Mid-Atlantic Corporate FCU, the group will have three main focus areas: advocacy, education, and community service. The goal of the group will be to help bring a voice to young credit union professionals and to help attract and retain young professionals to credit unions.



Association President/CEO Jim McCormack stopped by to welcome everyone, and not only voice his support for the group but to express how important its mission is to the future of the credit union movement.

The organization will be open to employees of affiliated credit unions between the ages of 18 and 35, and will have two primary groups within it: First, an informal network for young professionals to meet each other and become more involved in the movement, and the second will be a more formal certificate program for emerging credit union leaders.

Look for more information on the young professionals network in future editions of *Life Is A Highway*, as well as on our website.

Free Webinar for Young Professionals

Listen, Fight, Praise, Lead: Proven Methods to Solve Problems, Lead Effectively, and Strengthen Relationships

All credit union young professionals are invited to attend the first young professionals event, March 26, 2:00-3:00 p.m. [Click here](#) to register.

As a young professional, you're faced with a number of challenges: listening closely, confronting respectfully, resolving issues effectively, and keeping the bond with your co-workers strong. This session, presented by Andy Janning, will equip you with a proven listening technique featured on *Everybody Loves Raymond*, the six-step conflict resolution model from which the term "win-win solution" was coined, and the simple three-step method that works for either confronting or praising anyone.

Sales & Service Program for Credit Unions

Join Mark Arnold, nationally-recognized expert on credit union sales and service, for a unique program designed specifically for Pennsylvania's credit unions. ***Secrets to Success: Service & Selling Techniques for Credit Union Staff*** is more than just a workshop – it is a comprehensive training program. ***Secrets to Success*** is designed to help your credit union's member-facing staff improve their ability to provide the best service to your members, and to reach as many members as possible with your products and services.

The ***Secrets to Success*** program starts with a full day, in-person training with Mark Arnold on April 17 in Harrisburg, but also includes three webinars with Mark – one each in May, June, and July – to help your staff gain a greater understanding of sales and service best practices. Every participant will receive a comprehensive sales and service handbook, developed by Mark specifically for Pennsylvania credit unions, as well as access to all three webinars. A digital copy of the handbook and each webinar will also be provided, to make it easier to train other employees within your credit union.

Over the course of the full-day training and the three webinars, Mark will help credit unions find answers to questions such as:

- What is the best way to build relationships with members?
- How do you get to know your members and their needs?
- How can you show your members your appreciation for them?
- How do you sell additional products to your members without coming across as pushy?
- How can you evolve your techniques from sales pitches to providing solutions to member needs?
- How can you improve member service at your credit union?

In addition, Mark will share his eight basic service and selling tips, discuss member service in a challenging economy, and much more!

[Click here](#) for more information and to register.



Synergent Direct Marketing Services

Synergent Direct Marketing Services, a subsidiary of the Maine Credit Union League, is endorsed by the Pennsylvania Credit Union Association as a preferred and recommended service partner for marketing solutions. As a credit union service organization (CUSO), Synergent serves only credit unions, and has provided comprehensive solutions since 1971. Synergent Direct Marketing Services is dedicated to helping credit unions develop deeper member relationships through targeted communications.

Synergent Direct Marketing Services makes reaching your members simple, providing comprehensive support, and helping credit unions connect with members through targeted marketing for all services, including business services, loan growth, and product penetration, with data mining through credit union core processing platforms.

Direct Marketing Services provides personalized, targeted marketing, allowing your credit union to better understand members through research, and refine your messaging to resonate with your members. In addition to ensuring you have a creative and attention-getting direct mail or email piece, their service representatives work with your credit union to strategize a complete campaign, enhancing your member relationships and driving quantifiable results.

Synergent can also help your credit union realize the benefits of Onboarding. By reaching out to new members to increase their engagement with the credit union, you'll not only save money and increase product share, you'll ensure that new members are satisfied members.

Credit unions also experience the benefits of the latest statement processing technology. Direct Marketing Services collaborates with our Technology Services division to create comprehensive monthly and quarterly statements, offering convenience options like electronic statements as we monitor the process from initial design to final mailing.

Synergent Direct Marketing Services gives credit unions the support of dedicated service representatives, a creative design studio, comprehensive statement processing services, and full service production facility. It offers complete targeted marketing services, including collateral, creative design, production, advertising specialties, and promotional giveaways.

For more information on Synergent, contact your Association [Account Executive](#). Be sure to visit the Association's Products & Services [webpage](#) where you will find success stories like Evergreen Credit Union yielding \$2.1 million in new vehicle loans from Synergent's marketing support.

Convention Countdown

Grammy Award-Winning Musician to Deliver Keynote Message

At the 2013 Annual Convention and Exposition, CONNECT to a different way of thinking—you'll hear from keynote speaker, Jeffrey Baxter, Grammy Award-winning musician and national security consultant, will be the keynote speaker for the Association's 2013 Annual Convention & Exposition, May 16-18 at The Hershey Lodge in Hershey.

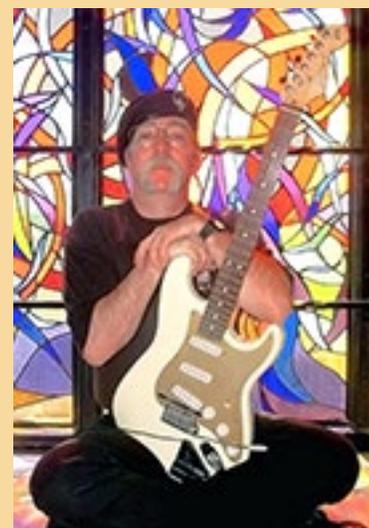
Speaking on Friday morning, Baxter will help conferees realize that yesterday's approaches may not be effective in tomorrow's world, but with the right thinking and logic, the future is an era of opportunity and growth.

Baxter began his successful music career as a guitar player for bands such as The Doobie Brothers, Steely Dan, and Elton John.

Though he was not trained as an engineer or scientist, he pursued his dual interests in music and technology by serving as a consultant to leading musical instrument companies, helping them apply state-of-the-art computer technologies to next-generation musical instruments. In the process, Baxter scoured the defense industry for emerging technologies that he could apply toward music, and soon, he began contemplating next-generation paradigms by which the Defense Department could reapply its own defense system. Baxter has now become a highly-valued consultant to the private sector, Congress, and the national security establishment.

Register today for the Annual Convention & Exposition and receive four ways to save: 1) early-bird registration; 2) discount for small credit unions; 3) discount for five or more registrants; and 4) special offer for credit union young professionals.

For more details and to register, visit [CONNECT](#).



Westwood Receives AAP Certification

Gregory Westwood, Senior Auditor for the Association, was formally awarded the Accredited ACH Professional (AAP) designation by the Mid-Atlantic Clearing House Association at a February 12 luncheon. The Mid-Atlantic Payments Association is one of 18 regional payments associations that belong to the National Automated Clearing House Association (NACHA). Westwood holds a B.S. in Accounting from Pennsylvania State University, and is certified as a Bank Secrecy Act (BSA) Compliance Specialist and a Credit Union Compliance Expert (CUCE).



The National Automated Clearinghouse Association (NACHA) requires all financial institutions that use a national ACH system to perform annual ACH Compliance Reviews by December 31. This requirement applies to both Originating Depository Financial Institutions (ODFI) and Receiving Depository Financial Institutions (RDFI). The APP designation allows Westwood to provide an ACH Review to credit unions that originate and/or receive ACH transactions in accordance with Appendix Eight of the ACH Rules.

For information on an ACH Review, contact Audit Services Director [Joel Slagan](#) at ext. 5241.

Managing the Comfort Zone of Volunteers

continued from page 1

Together, these three simple ideas can help explain, and even predict, a lot of board member behavior.

Board members and volunteers deserve recognition for giving their time, expertise, and leadership to support the success of the credit union. Although Volunteer Appreciation Week is April 21-27, 2013, these 10 unique ways to recognize your hard-working board members can be used all year long:

- Write a short feature story about individual board members in newsletters.
- Provide board members with nametags to wear at special events that indicate their role on the board.
- At board meetings, take the time to recognize individual members who have a birthday that month or are celebrating other personal milestones.
- Publicly introduce any board members who are in attendance at special events.
- Consider giving out an annual Outstanding Board Member award.
- Nominate outstanding board members for leadership awards.
- Start each board meeting by going around the room and acknowledging one special thing that each member has done that month to support your cause.
- Put framed pictures of your board members in the lobby of your credit union or in the board room.
- Publish brief bios of your board members on the "About Us" page of your website.
- Serve snacks at board meetings.

Keystone Extra is published bi-weekly online by the Pennsylvania Credit Union Association
4309 North Front Street, Harrisburg, PA 17110-1618
800-932-0661 • www.pcua.org

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News stories and photographs are welcome. Submit information for publication to janet.johnson@pcua.org.



Events Calendar

March

- 14
MBL Participations Conference, Lancaster
- 20
CEO Leadership Workshop, Mars
- 21
CEO Leadership Workshop, Harrisburg

April

- 17
Sales & Service Program, Harrisburg

May

- 16-18
Annual Convention & Expo, Hershey

Visit www.pcua.org
or contact the Association's Education Department for details on education programs and webinars.