Performance Pros Consulting – Small CU 1 Day On-site Visit





Loan Policy Review

Loan policy review to identify any barriers that may be stopping us from saying 'yes'.

Lender Coaching

Use the 4 C's of Lending to identify and manage risk effectively.

Frontline Coaching

Look at transaction history for outgoing payments going to the other FIs and recapture the business.

'All In' Lending

Use PPC's 'All in lending' model to increase cross-selling by making multiple loans to each member. Let's eliminate the 'order taking'.

Layout of the Visit...

Prior to visit:

- Set up a call with management to layout the day to hit the ground running once PPC arrives
- Review loan policy
- On-site Visit
 - 9 to 4:00 pm
 - Loan application review (approved and denials)
 - Coaching of employees
 - End the day with management to discuss next steps to continue the momentum

Cost

- Discounted by Performance Pros to just \$2,000 (this includes all expenses)
- CCUF, through the Hamilton Foundation, covers \$1,000 of the cost. NC/SC credit unions under \$50 million in assets receive the service, valued at \$3,000, for just \$1,000!