FROM FRIENDLY TO HELPFUL

Video Companion Worksheet Name _____ Date _____

As you watch, capture the main ideas in the blanks below. Short answers are enough. Then use the five habits and team discussion to put the ideas into practice.

1. SEE THE EXPERIENCE THROUGH THEIR EYES

A secret shop shows us what it feels like to approach the credit union as a potential _____.

The pattern we are seeing: high scores for friendliness, with lower scores for _____ and _____.

2. UNDERSTAND WHAT CLOSING MEANS

In this training, closing means helping someone reach a clear _____.

Progress might mean an application, an appointment, knowing which documents to bring or deciding an option does not fit.

3. GET CURIOUS ABOUT THE NEED

Before recommending a product, understand what the person is trying to _____.

One question from the video I could use in my own conversations:

4. MAKE PROGRESS EASIER

Replace a vague goodbye with a _____ next step connected to the person's request.

When a handoff or callback is needed, explain who will help and _____.

5. FOLLOW THROUGH WITH RESPECT

Before following up, ask for _____. If someone decides to wait or declines, honor that decision.

Before ending: Do I understand the need? Have I offered a useful next step? Does the person know what happens next? Have I arranged to keep my promises?

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PUT THE IDEAS INTO PRACTICE

People helping people means staying with someone long enough to help them make progress. Use these habits to make that part of everyday conversations.

FIVE HABITS TO PRACTICE

Ask one question beyond the product. Find out what the person wants to accomplish before recommending a next step. A rate question can open a conversation about their budget, timing or plans.

Replace the vague goodbye. Trade “Let us know if you need anything” for a specific offer connected to their request. For example: “Would you like me to walk you through what you need to get started?”

Make handoffs personal. Explain who will help, what happens next and when they should expect it. With permission, share what you have learned so the person does not have to start over.

Ask permission to follow up. Agree on the timing and purpose, then follow through. Respect the person’s decision if they prefer to wait or decline.

Recognize good judgment alongside completed loans. Celebrate thoughtful questions, clear explanations, reliable follow-through and respect for someone’s decision. Loan volume alone does not tell us whether someone received good help.

ONE CONVERSATION FOR YOUR TEAM

Think of a common checking or loan inquiry where we tend to end with “Let us know if you need anything.” How could we handle that same conversation so the person gets a useful next step and stays in control of the decision?

Discuss a realistic example together, then write the approach your team wants to practice.