

CUSOURCE[®] Position Roadmap



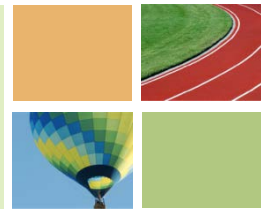
Branch Manager

Your *Roadmap* to Success

Getting you there!

The *CUSOURCE*[®] Branch Manager Roadmap directs you to the learning that will support you in obtaining the knowledge and skills required of this position. It's a tool that focuses your time, energy, and attention on key areas for someone in or headed to a retail lender position.

CUSOURCE® Branch Manager Roadmap



What is a Position Roadmap?

Like any journey, there are many side roads, detours along the way...all of which contribute to the total experience which, in this case, is you. Like any map, there is more than one route to your final destination. Use this one to get started, then, explore other learning “side roads” for a really rich experience.

Identifies Gaps. Points You to Learning.

The roadmap can help you identify knowledge or skill gaps then points you to courses on the CUSOURCE® Learning Management System (LMS). These course offerings include self-study, online classes or learning groups (cohorts), eclassrooms, as well as “in class” instructor-led courses (ILT).

A Learning Continuum

The roadmap is divided into three stages and the suggested learning activities categorized into technical and behavioural knowledge and skill areas for each stage.

Pick your Route. Choose your Speed.

Pick the learning that aligns with the knowledge and skills you need to acquire. **Develop** your own personal map. Then, **choose** the speed with which you cover the ground.



Everyone using this roadmap will move at a speed that reflects their current level of knowledge and experience. The timelines we state (0 to 24+ months) are guideposts, only.

Builds Credentials

Many of the courses on this roadmap lead to the professional designation -- **Associate of the Credit Union Institute of Canada** (ACUIC) as well as several lending accreditations:

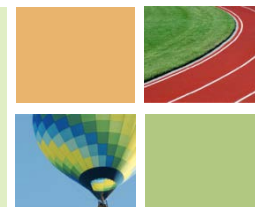
- Accredited Commercial Lending Administrator
- Accredited Commercial Lender
- Accredited Consumer & Residential Mortgage Lender

Basic Assumptions

This roadmap assumes that you have completed *core compliance courses* (such as anti-money laundering) as well as other courses related to your credit union and the credit union system.

To learn more about CUSOURCE® Position Roadmaps, or additional behavioural and technical competencies, contact Client Solutions at clientsolutions@cusource.ca or at 1.888.367.1386.

CUSOURCE® Branch Manager Roadmap



Developing & Building Knowledge & Skills

Technical Competencies

- Knowledge of Products & Services
- Knowledge of Financial Principles
- Consumer Lending
- Monitoring, Compliance & Auditing (Risk Management)

Behavioural Competencies

- Results Orientation
- Developing (Coaching) Others
- Team Leadership
- Customer Service Orientation
- Change Leadership
- Listening, Understanding & Responding

Guide to Type of Learning Activity

CUIC	Credit Union Institute of Canada (CUIC®) Each course leads to the nationally recognized professional designation Associate of the Credit Union Institute of Canada (ACUIC), jointly awarded with Dalhousie University. All courses available in self-study format; some as an online learning group (cohort) format.
eClass	eClassroom Leveraging the identical knowledge from an in-class course, the eclassroom provides a rich, interactive learning environment where participants are involved with a series of pre-work/self-study sessions combined with WebEx sessions.
HMM	Harvard ManageMentor®10 Consists of over 40 modules covering topics from budgeting to team management. The annual license fee provides access to all modules including the video clips and practice tools.
ILT	Instructor-Led Training Courses are led by an instructor offered in either in class or online formats. To view a comprehensive listing of ILT courses, please visit www.cusource.ca and click on the link to course catalogues.
SkillSoft	SkillSoft® eLibrary The annual licence fee provides access to over 1,300 courses and simulations including the popular one-hour series.

0-18 Months - Developing Foundational Knowledge		Format
Technical	› Products and Services (CUIC)	Paper
	› Introduction to Profitability	eLearning
	› Understanding Your Credit Union's Financial Statements	eLearning
	› Fundamentals of Personal Financial Planning (CUIC)	Paper
	› Consumer and Residential Mortgage Lending (CUIC)	Paper
	› Applied Consumer Lending	ILT
	› Applied Residential Mortgage Lending	ILT
Behavioural	› Advanced RRSP, Advanced RRIF	ILT(s)
	› RESPs: The Fundamentals	ILT
	› Effective People Management	ILT
	› Feedback Essentials (HMM)	eLearning
	› Customer Service Fundamentals* (SkillSoft)	eLearning
	› Interpersonal Communication* (SkillSoft)	eLearning
	› Leading and Motivating (HMM)	eLearning

12-24 Months - Building on Foundational Knowledge		Format
Technical	› Fundamentals of Capital Adequacy and Liquidity	eLearning
	› Handling Estates Effectively	ILT
	› Retail Lending for Self-employed Borrowers	ILT
Behavioural	› Difficult Interactions (HMM)	eLearning
	› Helping Others Succeed	ILT
	› Business Coaching Essentials* (SkillSoft) } or	eLearning
	› Coaching (HMM)	eLearning
	› Building Improved Work Relationships* (SkillSoft)	eLearning

12-24 Months - Building on Specialized Skills		Format
Technical	› Business Lending (CUIC)	eLearning
	› Commercial Mortgage Lending (CUIC)	Paper
	› Credit Union Financial Management (CUIC)	Paper
	› Credit Union Marketing and Sales Management (CUIC)	Paper
	› Advanced Consumer Lending (case studies)	eClass
	› Advanced Residential Mortgage Lending (case studies)	eClass
Behavioural	› Diversity (HMM)	eLearning
	› Emotional Intelligence Essentials* (SkillSoft)	eLearning
	› Change Management (HMM)	eLearning
	› Managing Organizational Change* (SkillSoft) } or	eLearning
	› Sales Team Management* (SkillSoft)	eLearning

* SkillSoft titles listed above are subcategories which include several course options for the learner.

Guide to Competencies, Learning Activities and Levels



This guide suggests the **competency level** to be achieved for high performance in this role. The learning activity (course) **Target Level**, is the level to which that particular course helps develop on the corresponding competency. More information on competency levels can be found on the CUSOURCE® LMS.

Technical Competency and Level		Learning Activity and Target Level	
Knowledge of Products and Services	3	Products and Services	2
<i>Demonstrating knowledge of the lines of business and range of products and services offered internally and/or externally by the credit union and its competitors.</i>		Advanced RRSP, Advanced RRIF	3
		RESPs: The Fundamentals	4
		Handling Estates Effectively	3
		Credit Union Marketing and Sales Management	2
		Introduction to Profitability	2
Knowledge of Financial Principles	2	Understanding Your Credit Union's Financial Statements	2
<i>Demonstrating knowledge of financial principles in the conduct of business activities.</i>		Fundamentals of Personal Financial Planning	2
		Fundamentals of Capital Adequacy and Liquidity	2
		Credit Union Financial Management	2
		Lending	3
<i>Demonstrating an understanding of the current economic environment, uses approved consumer lending principles and practices to complete lending transactions for members and customers.</i>		Commercial Mortgage Lending	4
		Business Lending	4
		Retail Lending for Self-employed Borrowers	2
		Applied Consumer Lending	3
		Applied Residential Mortgage Lending	3
		Advanced Consumer Lending	4
		Advanced Residential Mortgage Lending	4
Monitoring, Compliance & Auditing (Risk Management)	2	<i>Many risk management principles are included in the above courses.</i>	3
<i>Monitoring and/or auditing activities, processes and operations within the credit union to ensure compliance with relevant policies and procedures, sound business practices and provincial/federal legislative requirements.</i>			

Behavioural Competency and Level		Learning Activity and Target Level	
Results Orientation	4	Leading and Motivating	3
<i>A concern for working towards a standard of excellence. The standard may be from one's own past performance, an objective measure, the performance of others, challenging goals one has set, or even what anyone has ever done.</i>		Sales Team Management	4
		Team Leadership	4
<i>Taking on a role as leader of a team or other group. It implies the desire to lead others. It is often, but not always, shown from a position of formal authority.</i>		Emotional Intelligence Essentials	3
		Developing (Coaching) Others	4
<i>Involves a genuine intent to foster the long-term learning or development of others. Its focus is on the development of an individual and effect (rather than on a formal role of training, or completion of a task or objective).</i>		Helping Others Succeed	4
		Business Coaching Essentials	4
		Diversity	3
		Coaching	3
		Customer Service Orientation	4
<i>The desire to help or serve and build relationships with members and/or internal customers, to meet their needs. It means focusing one's efforts on discovering and meeting the customer's needs and expectations. ("Customer" includes members, internal customers or clients, suppliers.)</i>		Difficult Interactions	3
		Change Leadership	3
<i>The ability to energize and alert groups to the need for specific changes in the ways things are done. It involves helping the organization's members understand what the change means to them, and providing the ongoing guidance and support which will maintain enthusiasm and commitment to the change process.</i>		Managing Organizational Change	3
		Listening, Understanding & Responding	3
<i>The ability to accurately listen and understand, and then respond appropriately when interacting with individuals and groups.</i>		Building Improved Work Relationships	3

Contact Information

Please contact us for more information on *CUSOURCE*[®] Position Roadmaps.

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