

Creating an Awesome Sales and Member Service Culture

Presented by

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How Will You Thrive?

- What is your competitive advantage?
- We must prove value to member or, we are done.



Insert Your
Logo Here

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How Will You Thrive?

- The Average Credit Union Member Owns 10 Accounts – Filene Research Institute
- The Average Credit Union's Product Penetration is less than 2 products per member – NCUA



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The Challenge Grows

- Banks are now scoring higher than Credit Unions in Experience - for the first time ever.
- How has this happened?



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The Challenge Grows

- *Employee Engagement continues to be a challenge.*
- *Our employees are not wired for selling.*
 - *They are wired for service*



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Performance

Service

Sales

Gap between Attributes

Expect to Hire

Gap between Attributes

Skills



6

The Solution

- 98.1% of members responded that they would appreciate an employee telling them how they could improve their financial well-being
 - Only 25% say they experience it



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How to Create a Dynamic Sales Culture

- Member-Centric
 - Don't replicate the bank model.
 - Lead & Coach to Mission and Purpose



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How to Create a Dynamic Sales Culture

- Hire for Culture Fit
 - Both sales and service skills are important
- Develop Coaching
 - People don't do what they're trained to do.
- Measure and Set Minimum Expectations



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How to Create a Dynamic Sales Culture

- Hold Employees Accountable
- Reward High Performance
- Develop Product Knowledge
- Sales Training
 - Make it part of the job from day one!



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