# 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

#### **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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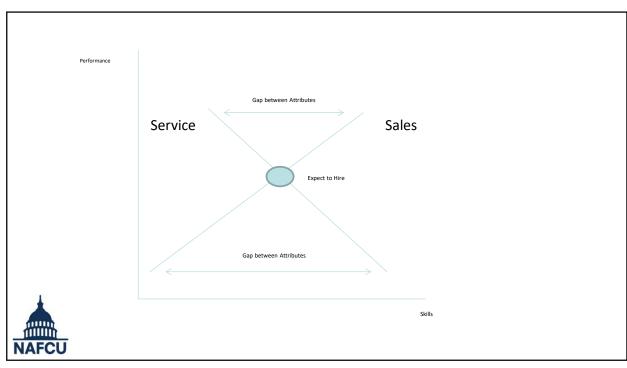
### The Challenge Grows

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



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### **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



## 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!

