

SALES CAMP

It's not just about selling - it's about improving members' financial lives.

FI STRATEGIES, LLC

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We can't get by with just great service anymore. If we're going to grow, we need to deepen relationships and that means selling.

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Almost every credit union needs to grow in some fashion or another. For some, it means growing loans; for some it means growing PFIs; for some it means growing members; for others, it's all of the above. Regardless of the growth goal, the challenge is the same - they need to grow to remain viable and continue serving their members and communities. And that requires doing something that most credit unions have not done at all or at least not done well in the past: sales.

Whether you use the word “sales” or not is up to you but implementing an effective sales environment is the only way to generate the growth your credit union needs to thrive in the future. There's a right way and a wrong way to do it - you can't just say you're going to do sales or you can't just implement an incentive program or you can't just run product campaigns and expect to grow.



You need a thorough, holistic, and dedicated effort to implement a sales strategy and culture. Don't try doing it the same way it was done somewhere else; your culture is unique. Don't implement sales goals and monetary rewards; your people feel threatened by them. Don't just say, “We need to sell” or “We need to deepen relationships”; your people don't know how to do that or they'd already be doing it.

Creating a sales environment requires the following four components only delivered by Sales Camp:

TAILORED CONTENT

The word “sales” means something very different to many different people, including your executives, managers, and member-facing staff. To be successful, you must get everyone on the same page and working in the same sales direction.



Sales Camp assesses the current environment of the organization and then works with your leaders to create one unified definition of sales. It clearly and consistently provides direction of what you’re wanting to accomplish with your sales efforts.

Further, it’ll help define and communicate success so there’s no confusion about the desired outcome. Included in this step will be identifying the metrics we can track along the way to make sure we’re moving the needles toward those growth goals.

Then, the content for Sales Camp is designed to deliver that precise definition and desired outcome and show all staff exactly what they need to do day-in and day-out to lead the credit union to fulfill that definition.

SPECIFIC SKILLS

Effectively delivering sales requires very specific sales skills and behaviors. And those skills and behaviors are distinctly different from the member service skills and behaviors your staff has been delivering previously.

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“I love how Sales Camp is tailored for our credit union. It’s really helped with the buy-in from every employee and has us unified in the same direction.”

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Sales Camp will teach your staff what they need to do and say in order to deepen relationships with members. Further, it will provide staff the opportunity to safely practice so they will feel completely comfortable and confident with that very next member they wait on.

The skills and behaviors taught in Sales Camp are also specific to what coaches will need to do to reinforce and solidify the sales focus at every level of your credit union.

ONGOING SUPPORT

For the majority of staff, this will be a new experience, and the new expectations might be a little daunting. Therefore, they’ll need lots of support. And Sales Camp delivers.

Each sales leader will be assigned a personalized coach to help them fully deploy the sales efforts with their team. Staff members will have access to a sales network of best practices. And executives will

participate in progress review meetings to make sure your sales culture is maturing as planned.

At a credit union, team, and individual level, Sales Camp provides the ongoing support needed to make sure your sales culture gets on the right track and stays there.

CULTURE DEVELOPMENT

From our experience in creating top-performing sales cultures for over 20 years, we know that things don't always go as designed at the outset and that improved skills and behaviors may not be enough to realize the desired growth impact.

There are multiple components to a successful and sustainable sales culture. The good news is you don't have to be great in every component but you do have to at least have a plan for each. Depending on your current situation, our consultants are positioned to help you with every component to maximize your sales performance, including: turning your managers into sales leaders, restructuring incentive programs, creating performance scorecards, aligning marketing and sales, and streamlining operations that impact frontline performance.

“*This training was awesome. It's just what I needed to take my service to the next level. I totally feel equipped now and ready to go!*”

CONCLUSION

Creating a successful and sustainable sales environment at your credit union isn't easy, it won't happen overnight, and likely will require some level of outside help. The road is littered with organizations that have dabbled in “sales” and failed. Some created such a negative environment their staff resisted until the effort was abandoned. Some did it pretty well initially but took their foot off the gas and the momentum was lost.

“*Sales Camp provides great sales skills ... without being too salesy. It teaches what our staff needs to understand the member's needs, fit them with the right solution, and take the follow-on steps to deepen the relationship.*”

Sales Camp has been created because your credit union needs this type of outside support to do it right the first time and make sure that it sticks. Don't inadvertently send the message that this is just another training program or it's some passing focus that'll go away in a few months. No, send a clear and definitive message that this is the present and future of your credit union - it is needed to continue to serve the members and communities your staff loves so much.

Our commitment to you is that Sales Camp will never be an off-the-shelf solution. It'll become your solution - the precise one you and your team needs in order to successfully meet your goals and grow long into the future.

THE SALES CAMP EXPERIENCE

Typical engagements with organizations include:

- ▶ Assessment of staff to fully identify your current sales strengths and weaknesses and create tailored content for the upcoming workshops
- ▶ Meeting with execs to deliver assessment results and identify action steps related to your new, desired sales culture
- ▶ Meeting with key stakeholders to tailor content to meet your definition of sales, service, and experience (create your “Way”)
- ▶ Workshops to turn managers into sales leaders who can introduce your new sales culture and provide ongoing reinforcement coaching
- ▶ Workshops tailored to all sales roles – including branch and contact center sales – to deliver new sales skills and behaviors
- ▶ Personalized sales success playbook for each retail delivery channel and staff
- ▶ Field coaching meetings with all sales coaches to solidify the reinforcement coaching steps and fully implement the new sales culture
- ▶ Progress review meetings with key stakeholders to assess overall progress and make modifications, as needed, for continued improvement
- ▶ Access to online catalog of our sales and sales coaching videos
- ▶ Follow-on virtual workshops to reinforce the key sales skill components
- ▶ Facilitation of staff networking events to celebrate successes and share best practices
- ▶ Re-assessment after one year from original assessment to demonstrate sales progress
- ▶ Optional: deliver a tailored version of Sales Camp to your Contact Center/Digital Branch staff and managers

An important note: each client is different and, therefore, each engagement will be modified for each client. We will provide a specific proposal outlining the number and frequency of the deliverables listed above. We will partner with you to create and deliver the absolute best solution for the sales and sales coaching culture you're looking to create.

Why FI Strategies?

For over 25 years, our consultants have been building sales cultures at financial institutions of every shape and size. We've built them from the ground up and rebuilt them after initial efforts have failed. We've learned there are definitely best practices but there is no one way to do it ... there is only YOUR way to a highly successful and sustainable sales culture. Blending those best practices with our experience and your growth objectives is the right way.

If your credit union is ready to deploy a new and highly successful sales culture at your credit union, our team of consultants are ready to help. **Contact us at fi-strategies.com/contact or 636-578-3280.**