

# Excellence in Operations, Sales & Service Awards



## 2008 Excellence Winners



### Mayo FCU, Rochester, Minnesota



**Sales & Service Management category winner** for implementing and fostering a strong new sales culture, and their unique “Swashbuckler” incentive program. The rather unconventional award, was when a lender closed a loan with new business stolen from another financial, they are asked to send out a credit union wide e-mail explaining the steal. We have currently stolen \$515,781.91 in new consumer lending money within the three months the Swashbuckler program has been active. And our employees love the program! Before this program was in existence, the consumer lenders would be celebrated for their efforts only a couple of times a year. Now they are talked about and congratulated on a bi-weekly basis. [See the Entry](#)



### **Tucson Old Pueblo CU, Tucson, Arizona**



**Branch Design category winner** - We opened our doors in 1935 with 19 members and \$30.75 in assets. Since then, we have added many innovative elements to our new branch design to enhance the member experience. Our goal was to create an authentic yet dynamic and modern experience

that demonstrates we are part of Tucson and committed to providing members with the technology and superior service they crave. Goals set and exceeded: \$3.8 million in new deposits after two months, far exceeding our expectations of \$300,000 a month. 56 new checking accounts were opened in the two-month period, once again soaring above our goal of opening 35 new checking accounts in a three-month period. We garnered 11 real estate referrals and set up 26 appointments with the investment advisor. [See the Entry](#)

### **Financial Partners CU, Downey, California**



**Call Center Operations winner** for implementing the “POD system”, a simple reorganization of the Contact Center. The

representatives are broken out into small teams (PODs). The teams are designed to encourage open communication, forward thinking, and cross pollination of proven best practices that will positively impact the member experience. Enhances included checking production increased by 40% in the month of June thereby supporting the organizational goal of core deposit growth, and calls transferred to Loan Service department has decreased by 35%, and Contact Center Reps share a feeling of empowerment. [See the Entry](#)