

Excellence in Operations, Sales & Service Awards



2011 Excellence Award Winners



(L-R) Jennifer Lehn, OpSS Council Chair, EVP, Numerica CU; Darrell Stark, Chief Retail Officer, Oregon Community CU; Robb Keith, OpSS Council Executive Committee, SVP Retail Services, Members 1st FCU

Oregon Community CU in Eugene, Oregon

Sales & Service Management category winner for its 360 Training: Excelling in a Sales Culture program that includes:

- Organization wide training
- Product knowledge workshops
- Incentives program

As a result of the credit union's efforts, loan growth increased by 8.5% and deposit growth by 3.15%, exceeding all goals. [See the Entry](#)



(L-R) Jennifer Lehn, OpSS Council Chair, EVP, Numerica CU; Steve Langley, VP Sales/Service Training, Travis CU; Robb Keith, OpSS Council Executive Committee, SVP Retail Services, Members 1st FCU

Travis CU in Vacaville, California

Sales & Service Management category winner for creating, cultivating and sustaining a sales and service culture. Their strategy includes:

- Creation of Retail Sales Managers to ensure service standards accountability
- Development of a formal sales training program
- Creation of Travis Intelligence to analyze sales efforts

Success can be seen in both the number of new direct members and the increase in wallet share, both of which are expected to exceed goal. See [the Entry](#)



(L-R) Jennifer Lehn, OpSS Council Chair, EVP, Numerica CU; Angie Pidde, Training Coordinator, SouthPoint FCU; Robb Keith, OpSS Council Executive Committee, SVP Retail Services, Members 1st FCU

SouthPoint FCU in Sleepyeye, Minnesota

Sales & Service Management category winner for their Service Points of Excellence Program that includes:

- Bi-weekly coaching sessions
- Member and staff surveys

In addition to positive feedback from member surveys, success can be seen in the increase in overall cross sells. [See the Entry](#)



(L-R) Jennifer Lehn, OpSS Council Chair, EVP, Numerica CU; Rick Schmidt, President/CEO, WestStar CU; Mona Joseph, AVP/Business Development, WestStar CU; Robb Keith, OpSS Council Executive Committee, SVP Retail Services, Members 1st FCU

WestStar CU in Las Vegas, Nevada

Miscellaneous category winner for hosting two job fairs for their members. Their strategy includes:

- Holding the fairs in Las Vegas and Reno, two economically hard hit areas
- Allowing participating employers with open positions only
- Giving priority entrance to WestStar CU members

With 4,300 jobseekers, twenty-three employers (WestStar SEG groups), and over 1,000 jobs, the fairs helped more than 70 people gain employment and garnered the credit union local and national attention. [See the Entry](#)



(L-R) Jennifer Lehn, OpSS Council Chair, EVP, Numerica CU; Kevin Roland, Sales & Service Director, FedChoice FCU; Robb Keith, OpSS Council Executive Committee, SVP Retail Services, Members 1st FCU

FedChoice FCU in Lanham, Nevada

Miscellaneous category winner for their creation of Member Councils to gain insight on:

- Financial pain points
- Preferred communication methods
- Product and service awareness

Nine meetings were held over a three month period. FedChoice has implemented numerous suggestions made during these meetings with additional changes in progress. [See the Entry](#)