



Excellence in Operations & Member Experience Awards

As operations and member experience professionals, we are asked to develop solutions to a variety of problems. Often, we research situations and develop entirely new and possibly unique practices for our credit union's operations and member experience areas.

Identifying these new approaches and recognizing their universal application to credit unions nationwide is the purpose of the CUNA Excellence in Operations & Member Experience Awards. One of our hallmarks is sharing the approaches to these solutions with our peers.

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CATEGORIES

The CUNA Operations & Member Experience Council is comprised of professionals who work at small, medium and large credit unions with a variety of roles and responsibilities. In recognition of this diversity, the awards will focus on "best practices" in four distinct areas of operations and member experience disciplines. Awards will be presented to credit unions achieving operations and member experience excellence in...

Three asset groups:

- < \$150 Million
- \$150 Million - \$500 Million
- \$500 Million

And four categories:

Sales and Service Management: What innovative approach have you implemented at your credit union to create, cultivate, and sustain a successful sales culture? What sales tools have you designed to assist staff with selling and customer relationship management (CRM)? What unique sales coaching or incentive programs have you developed?

Branch Design: What non-traditional elements are you deploying in new branch and remodeled branch facilities to enhance member service? What have you done to "push the envelope" and differentiate the look of your branches?

Contact Center/E-Support: What have you done to provide outstanding performance and set the standard for excellence in your call/contact center? How are you leveraging electronic channels to gain efficiencies or improve service?

Miscellaneous: This category is for any operations and member experience success story you have that does not fit the other categories.



ELIGIBILITY

- Entrants must be a member of the CUNA Operations & Member Experience Council
- The practice must have been initiated prior to March 2019
- Entries must be received by July 12, 2019
- The award winner or a representative must be in attendance, at the conference to accept the award

MEASUREMENTS

The following measurements are examples to consider for your nomination. This is not an all-inclusive list and there may be other existing metrics that define the results of the project.

- Sales and Service Management
 - Cross-Sale Ratio or Cross-Sale per FTE
 - Services/Products per Household or Member
 - Deposit Growth
 - Loan Growth
- Branch Design
 - Member Growth
 - Ratio of Members/Potential Members
 - Branch Profitability
- Contact Center/E-Support
 - Abandonment Rate
 - Calls Handled Per Call Center Representative
 - Average time to answer
 - Average talk time
 - Operating Expense
 - Salary and Benefits
 - Transactions per Hour
 - Members Served per Hour
- Miscellaneous

THE SELECTION PROCESS

A panel of Operations & Member Experience Council Executive Committee members and industry professionals will select the Excellence in Operations & Member Experience Award winners in the three asset categories above. Selection will be based on candidates' strategy, process, application and results.



WINNER RECOGNITION

Award winners will be recognized at the [22nd Annual CUNA Operations & Member Experience Council Conference](#) held September 11-14, 2019 in Chicago. Winners are expected to attend and accept their Excellence Award during the awards ceremony at the conference (acceptance speech is not required). Each winning credit union will receive one complimentary conference registration. Winning entries will be featured in a press release and in *CUNA News Now* in addition to being showcased on the CUNA Operations & Member Experience Council website.

HOW TO ENTER

The entry form must be completed and submitted online. The steps below outline exactly how to enter.

1. Register an Account
2. Create Your Entry
3. Upload Digital Files
4. Submit Entry

[LOGIN](#) – to begin entry process

Entries must be received no later than 11:59 pm CST on **July 12, 2019**.

Entrants will be notified of the status of their entry by **July 31, 2019**.

QUESTIONS

If you have questions about the entry procedures, please contact CUNA Council Administration at 1-800-356-9655, ext. 4018 or awards@cuna.coop.

If you have questions about criteria for the awards, please contact Jason Ford, Awards Chair and COO, Harvester Financial Credit Union, jason@harvesterfcu.org, or Bill Thomas, Awards Vice Chair and 1st VP Member Operations, United Nations Federal Credit Union, bthomas@unfcu.com.

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