



Excellence in Operations, Sales & Service Awards

2015 Winners

Pioneer FCU in Mountain Home, Idaho, won in the Branch Design category (assets \$150-\$500 million) for their “Moving the Branch Experience Forward” entry. Pioneer re-imagined what a branch could be when designing their new Broadway branch. Now members can enjoy a high-tech feel that embraces the community.

[View the entry.](#)

Numerica CU in Spokane Valley, Washington, won in the Branch Design category (assets over \$500 million) for their “Breaking Down Barriers: Numerica Credit Union Branch Redesign” entry. Numerica responded to the impact technology is having on reducing branch traffic by making technology the centerpiece of their branch design. The credit union freed their staff from the traditional roles, brought them out from behind the counter and trained them to be a universal staff. Now there can be a single contact to address member needs. [View the entry.](#)

Oregon Community CU in Springfield, Oregon, won in the Contact Center/E-Support Operations category (assets over \$500 million) for their “OCCU: Member Contact Center Excellence” entry. OCCU drives success in their member contact center through technology, sales and a positive work environment. They have driven down their abandoned rate while achieving 102% of their MCC credit card goal.

LGE Community CU in Marietta, Georgia, won in the Miscellaneous category (assets over \$500 million) for their “A Smarter Way to Bank” entry. LGE has improved efficiency and enhanced the member experience through a multi-channel approach. They upgraded their online and mobile channels to free up branch staff to focus on new accounts, loans and member service issues. They also developed new branch models including a remote teller facility as well as an ATM branch. This approach has led to 19% loan growth and 5% member growth from 2013-2014. [View the entry.](#)

Southwest Financial FCU in Dallas, Texas, won in the Sales and Service Management category (assets under \$150 Million) for their “How We Have Grown Loans 50% Over the Past Three Years” entry. Southwest achieved these spectacular results by restructuring sales, now defined as member opportunity and restructuring service, now defined as member loyalty. In addition they retooled their frontline positions and salaries to focus more on incentives and had their frontline re-apply for the new jobs. They also implemented an internal on-boarding program to engage new membership and their loan growth continues to track in the double digits.

[View the entry.](#)



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Mill City CU in Minnetonka, Minnesota, won in the Sales and Service Management category (assets \$150-\$500 million) for their “IMPRESS!live Sales and Service Program” entry. Mill City has continued to focus and refine their service efforts by educating their staff on having meaningful conversations with members on everyday financial needs. The refreshed Sales and Service culture relies on the continued reinforcement of skills developed through Sales and Service trainings for staff and through member education. IMPRESS!live Service begins at on-boarding and continues through hip coaching and observations throughout the staff person’s career at Mill City CU. This approach has driven a \$15 million increase direct loans by frontline staff over three years. [View the entry.](#)

Red Canoe CU in Longview, Washington, won in the Sales and Service Management category (assets over \$500 million) for their “Game of Phones/Monopoly: Red Canoe Financial Group Edition” entry. They developed a learning campaign to strengthen outbound calling skills and proactively produce sales results. In addition, they focused on teaching staff members about the opportunities their members have with their financial group and promote unique actions for staff to refer members. These training and sales campaigns lead to \$946,000 in new loans and a 120% increase in referrals to their financial advisors. [View the entry.](#)

University of Michigan CU in Ann Arbor, Michigan, won “Best of Show” for their Sales & Service Management “Engagement in Sales – #OperationHoustonDiscover” entry. The credit union used data analytics and staff focus on their Visa credit card to produce a significant increase in credit card sales. To simplify the process they developed one tool for automatic Visa approvals and a second tool to determine what a member would save if they moved credit card balances to the credit union. Through these methods the credit union increased credit card balances by \$13 million in one year. [View the entry.](#)