

IDEA CURRENCY WORKSHEET

for Credit Union Staff

From Products to Possibilities

Objective: Reflect on your role in delivering value through ideas, not just products. Practice reframing member needs through curiosity, insight, and purpose.

Instructions: Rewrite the following product-pitch statements into idea-led, solution-focused responses.

Product Pitch	Reframe as an Idea-Led Conversation
"We have a 1.99% auto loan rate."	"What would it mean for you to lower your monthly car payment – more flexibility, peace of mind?"
"We offer high-yield savings accounts."	"What's something you're saving for, and how can we help make that happen faster?"
"We can help consolidate your debt."	"What would financial breathing room feel like to you?"

Write your own example below

Product:

Idea-led conversation:

Big Idea Prompts

Choose one member interaction from the past week. Answer the following:

1. What did the member really want (beyond the product)?

2. What question could you have asked to uncover their “why”?

3. What insight could that have led to?

4. What solution could you have offered based on that insight?

Write one sentence completing this prompt:

“This week, I will shift from pitching products to trading in ideas by