

# ENGAGE TO WIN

## Supercharge Your Sales with Engagement

Your credit union isn't merely after numbers on a balance sheet. You're in the business of creating success and wealth for your members. When it comes to making rock-solid connections, here are five things high performer sales teams do particularly well to build meaningful connections and keep members engaged.

### Instructions

- Have each member of your team complete.
- Rank your team's alignment with each sales strategy on a scale of 0-100 (0= Not Aligned, 100 = Well Aligned).
- Blend the scores to unveil an average ranking for each strategy.



### Dive Deep into Personalization

The art of truly understanding your members — their needs, preferences, and challenges.



### Embrace the Power of Storytelling

Weaving narratives that not only sell loan products, accounts, and memberships, but create emotional connections and brand loyalty.



### Foster Two-Way Communication

Truly connecting through active listening, responsive communication, and building genuine relationships with members.



## Leverage the Magic of Community

Building a tribe, where engagement leads to loyalty, referrals, and an unwavering positive brand image.



## Prioritize Post-Purchase Engagement

Where continued connection leads to repeat business, upselling opportunities, and a cascade of positive reviews.

### Discussion:

- Justify your rankings with a positive outlook and share your unique perspectives.
- Uncover common threads in your team's alignment.
- Discuss and create an outline of actionable steps for improvement, knowing that your team's success lies in unity and continuous growth.

### Notes