

OVERVIEW

This case study captures key issues and results for *Sunmark Federal Credit Union* a full service member-owned financial institution dedicated to improving members' financial well-being.

Originally a GE based credit union, *Sunmark Federal Credit Union* was founded in 1937. Sunmark has more than 46,000 members, \$435 million in assets and 195 employees. In the past five years, Sunmark has achieved double digit growth as a community based credit union.

OBJECTIVES

- Implement a sales process compatible with company core values.
- Establish a common process and language of selling for their staff.
- Enhance the organization's ability to create value for their members through increased staff professionalism.
- Meet and exceed the needs of members through creative ways for them to save money.



SOLUTIONS IMPLEMENTATION

Sunmark was looking for strategic and integrated processes that would align with their core values especially those key principles of "Absolute Integrity" and "Legendary Service". In 2003, Sunmark implemented Integrity Selling® followed by Integrity Coaching® and Integrity Service® to compliment, enhance and provide a total experience for members.

Integrity Selling® was implemented with back office employees including the Commercial Lending/Commercial Relations, Marketing, Human Resources, and Member Investment employees. Integrity Selling® was also implemented among the main group of sales people with titles of Loan Consultants and Tellers.

"Our mission is to WOW the member, and I believe Integrity Selling® is perfectly aligned with our mission, vision and values. We have numerous examples of members contacting us with words of praise. Members can't believe we called them to offer them options that SAVED them money. Our core values include operating with 'Absolute Integrity' and providing members 'Legendary Service.' Integrity Selling® certainly supports these values."

Bruce Beaudette—CEO of Sunmark Federal Credit Union

IMPACT

Created a strong values culture impacting retention of high performers.

Nominated (for the fourth year) by their employees as a "great place to work."

Generated over 100 WOW comments from members in a 3 month period.

Implemented a life-changing process: "tellers have gone from selling nothing to selling everything."

"Integrity Selling® was the missing link to our already existent sales culture. Integrity Selling® improved the selling skills of all staff impacting both low performing staff to acceptable levels while exciting our best performers to raise their performance as well. Enthusiastic implementation of Integrity Selling® produced an immediate impact on our sales performance as well as give us an ongoing process for continued training and improvement in all sales areas."

Tom Wiedl—VP of Sales and WOW