



@TeresaAllen
#custserv

Leading Your Credit Union Member Service Team & Initiatives In a New Reality

Actions of Service Leaders: *Can We Emulate Them?*

Changing Member Service Preferences: *What NOW?*

Communicating with Members During a Crisis: *How?*

Member Expectations: *How do we Meet and Exceed Them?*

Getting Through Conflict & Complaints: *How do We Respond?*

Taking Action to Build Member Relationships: *What will YOU & Your CU Do?*

Actions of Service Leaders Amid the COVID Crisis

UHaul free storage for displaced college students

Ford 'Build to Lend a Hand' campaign

Budweiser 'We are all one team' campaign w Red Cross

Fidelity 'Take the pen!' campaign

Baker Soft Wash cleaning playgrounds

Screwball Whiskey 'Screw COVID 19' campaign to help restaurant/bar workers

Paypal Fee Waivers for small biz

Credit Card Co fee waivers

Building Trust through Member Focus: Touchless but IN Touch

Value Changing Member Preferences

Educate Members on Touchless Options

Prior to COVID: 59% companies had lost touch w human element

75% prefer to interact w human vs automated system

Member Communication Needs

Be seen & understood

Be honest

EXTREME Sensitivity to tone and motive

52% consumers feel normal advertising inappropriate at this time



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WHAT to communicate to members

Changes in CU operations

Hours

Closures

Staff Reductions

Member Service Availability

New Products/Services that may solve member issues brought on by COVID

HOW to communicate with Members

Social media because immediate

Video Message from CEO or other Exec Team Member

We are strong

We are here for you

We are here for our team members

We are here for our community\

[Message from Jeff Meshey, Pres/CEO Desert Fed CU](#)

Member Value Expectations

Value MY preferences

Give me choice of service channel

Value ME

I want to interact with a person

I want you to show empathy

I want you to care about my family, my job, my life

Post Covid Expectations

Get me IN and OUT

Give me interconnected in person and online experience

Share your brand story

Keeping a Pulse on Member Satisfaction

Surveys may take too long for today's quickly changing environment

Social Media, Chats, Walk arounds better for REAL TIME feedback

Listen to and have means to collect front-line team member input



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Institutional vs Transactional Complaints

Transactional—Focuses on specific transaction

Usually product or people related

How to handle: Listen carefully, show empathy, act QUICKLY to resolve

Institutional— Employee receiving it has no personal control over it

Centers on the WAY you do business, NOT a specific incident

How to handle: Listen carefully, show empathy, offer to pass on to management

***Crisis is composed of two characters when written in Chinese,
Danger and Opportunity!*** —John F Kennedy

What ACTION can you take to improve Member Service at YOUR CU?

1.

2.

Programs for your CU Staff Training or Chapter Event:

Allenspeaks.com/Credit-Union-Speaker

Making Lasting Member Impressions

Building Member Relationships Through Common Sense Service!

Member Conflict: Opportunity Knocks!

The Art of Asking Questions: Building Member Relationships

Expectations: Meeting 'Em & Beating 'Em

Common Sense Communication: Who am I, Who are YOU?

WE CAN Teambuilding



Please vote for Teresa on GlobalGurus.org
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