



CASE STUDY

Company: The logo for Service 1st Credit Union, featuring the word "Service" in blue, "1st" in a large red font, and "CREDIT UNION" in smaller red letters below.

Category: **Relationship Selling**

About Service 1st: Service 1st Credit Union is a federally insured financial institution founded in 1939 as Tamiami Bus Lines Credit Union. In 1996, due to expanding membership, the name was changed to the current Service 1st Credit Union. Service 1st Credit Union philosophy is "People Helping People" by offering members low cost loan products and excellent service.

Current Situation: Service1st is a dedicated and experienced credited union with its employees' experience ranging from 5-25 years. But like any great organization ongoing learning is always necessary in staying at the top. The human resource department recognized the need for employees to have a better understanding of selling to compete in a today's market.

Reason: Service 1st hired Eric to educate the employees about selling and get them comfortable selling their services to their members.

Results: Eric and his company conducted 4 educational sessions on relationship selling and were successful in accomplishing the objective. They educated the employees on how to be viewed as a trusted advisor, took the stress and fear out of selling, and created a job aid that gave the employees a greater degree of confidence when engaged with a member. As a result of the training Eric has developed a relationship and has been back to work on two other projects.