

Nomination: 8622

Desert Financial's In-House Sales Blueprint Program

Page: General Information
Provide information about the company to be considered for the award. If you will be nominating an individual, specify the nominee's employer.
Name of Organization/Company Desert Financial Credit Union
Additional Contacts I do not wish to list additional contacts
Page: Entry Information
Entry Title Desert Financial's In-House Sales Blueprint Program
Category F01 - F70 Solutions, Implementations, and Training Programs or Media > F50 - F68 Training Programs or Media > F64 - Sales Training
Training Programs or Media Submission Format Written Answers
a. If this is a brand-new product, state the date on which it was released. If this is a new version of an existing product, state the date on which the update was released. Required Since the beginning of 2024, the Desert Financial Learning & Development team has prioritized the implementation of the Sales Blueprint (SBP) as a primary strategic objective. Our goal is to integrate the SBP methodology into the organizational culture, enabling our team members to connect individually with members and address their financial needs, thereby enhancing their financial well-being—a critical goal for our organization. We have achieved this by training nearly 100 member-facing employees in intensive SBP sessions and embedding the SBP methodology into our New Hire Onboarding program.

b. Describe the features, functions, and benefits of the nominated program or media (up to 350 words). Required

The Sales Blueprint (SBP) program at Desert Financial Credit Union is a comprehensive training initiative designed to enhance sales capabilities and focus on personalized member service designed to empower financial well-being.

Key features include:

CUSTOMIZED CONTENT:

The SBP program is tailored specifically to Desert Financial, integrating our organizational goals and culture. This ensures the training is relevant to our team members' daily interactions and responsibilities.

COMPREHENSIVE TRAINING MODULES:

The program includes intensive sessions covering essential sales techniques, member engagement strategies, and financial well-being advising. These modules provide a deep understanding of the sales process and effective member communication.

INTERACTIVE LEARNING METHODS:

The SBP program utilizes interactive learning methods, such as role-playing, scenario-based training, and peer-to-peer feedback. This helps participants practice and refine their skills in real-life situations.

CONTINUOUS IMPROVEMENT:

The program emphasizes continuous improvement through regular sustainment sessions, skill assessments, and personalized action plans. Participants set goals, monitor progress, and receive ongoing support from leaders.

LEADERSHIP INVOLVEMENT:

Leaders provide coaching, feedback, and support, ensuring that skills and techniques learned are consistently applied and integrated into daily operations.

MEASURABLE OUTCOMES:

The program tracks performance metrics, such as sales lift, member satisfaction scores, and individual development progress. These metrics quantify the training's impact and identify areas for further improvement.

Key benefits include:

ENHANCED SALES PERFORMANCE:

Participants have shown a 15% increase in sales, demonstrating the training's effectiveness in improving sales skills and techniques.

IMPROVED MEMBER SATISFACTION:

The training helps team members better understand and meet members' financial needs, leading to higher satisfaction and stronger relationships.

COST EFFICIENCY:

By customizing and taking the training in-house, Desert Financial has achieved significant cost savings compared to outsourcing.

CULTURAL ALIGNMENT:

The program reinforces Desert Financial's culture and values, ensuring all team members are aligned with our mission of empowering financial well-being.

These features and benefits make the SBP program a vital component of Desert Financial's strategy to drive member growth, satisfaction, and financial well-being.

c. Outline the market performance, critical reception, and customer satisfaction with the product or service to date. State monetary or unit sales figures to date, if possible, and how they compare to expectations or past performance. Provide links to laudatory product or service reviews. Include some customer testimonials, if applicable. (up to 350 words). Required

Market Performance:

The SBP program has trained nearly 100 member-facing employees, resulting in a 15% sales increase.

Critical Reception:

The SBP program has been highly praised internally by participants and leaders. Its customized content and in-house delivery have ensured greater relevance and application, positively impacting team dynamics and sales culture.

Member Satisfaction:

Member feedback has been overwhelmingly positive, noting improved service quality and personalized attention from SBP-trained employees. One member stated, "The SBP-trained advisor understood my needs and offered tailored solutions, significantly aiding my financial planning."

Comparison to Expectations:

The SBP program has surpassed expectations in sales performance and cost efficiency. The in-house training model reduced expenses and enabled more frequent, flexible sessions, improving skill retention and application. Compared to outsourced training, the SBP program has shown higher ROI and better alignment with Desert Financial's strategic goals.

TESTIMONIALS:

"The training has transformed the way our advisors interact with members. They are more confident, knowledgeable, and genuinely invested in helping members achieve their financial goals." – Michael Murrieta, Senior Trainer

"I've seen a significant improvement in our team's ability to connect with members and offer solutions that truly make a difference. The SBP program has been a game-changer for us." – Daniela Peralta, Branch Manager

"I recently had to replace my debit card at a Big 3 Bank branch and met with a Senior Banker. During our conversation, he asked about my profession. When I explained that I was a sales consultant focused on empowering financial well-being for our member-facing teams, he was intrigued. I elaborated that, unlike traditional sales training that emphasizes selling techniques, our approach is centered on understanding how people make decisions and tailoring our methods to meet their needs. This helps members see the benefits through their own perspective. The Senior Banker, who had been in his role for 14 years, was surprised and remarked, 'We don't talk about how to help people see what would be of most financial benefit to them, through THEIR eyes.' It was a powerful moment that underscored the unique value of our training approach."

