

## Case Study

# Highlights of Wauna CU's Partnership with

As described by Robert Blumberg, CEO



### CREDIT UNION PROFILE

#### Assets

\$429,082,479

#### Members

25,450

#### Membership

General field of membership, members either work, live, attend school, or worship in counties we serve

#### Locations

West of Portland Counties in Oregon, Pacific County in Washington

### NOTABLE STATS

Branch NPS - **12%**  
Improvement from  
2022-2023

Products per member -  
Continued Growth Over  
The Past Year

Membership Growth  
**4.85%** in 1 year



### CLIENT OVERVIEW

Wauna is a member-owned not-for-profit credit union that offers affordable financial services to residents and businesses in Oregon and Washington. With 8 local branches, Wauna has been recognized as one of the 100 Best Nonprofits to Work for in Oregon in previous years. Wauna's vision is to be the financial institution that members choose first, use the most and grow with throughout their lives.



### EXPERIENCE WITH THE PROGRAM

Our partnership with Integrity Solutions initially launched in August 2014 and has continued these past 10 years. We were looking for sales and service training that would deepen relationships with members, increase loan and deposit growth, and shift our team's mindsets around selling. This partnership has greatly impacted on our financial institution, so much that we changed our Value statement because of the practices within the sales and service training.



### DESIRED OUTCOMES

We wanted to have every employee, front office and support staff to be member focused. To ensure our members were getting the same experience with everyone that they may encounter. Our sales teams felt like they were "order-taking" and didn't want to become a pushy salesperson. With the sales and service culture training we learned that once the needs of members were understood, we could better provide the services the members desired. We didn't want our teams to be offering solutions without understanding what the members needed.



## IMPACT

As an organization, we averaged 88% positive feedback responses for our member service surveys in 2023. After our April seminar with Integrity Solutions, we moved up to 89%, and following the October seminar, we moved up to 90%. Sustaining that positive feedback from our members for the remainder of the year. Our loan portfolio grew significantly, growing over 14% in 2023, increasing during and after the sales and service training. Team members felt more comfortable providing member needs-focused solutions.

Our proudest accomplishment is that our membership grew an astonishing 4.85% over the past year. Team members were welcoming members and potential members into the branch and our happy members were bringing in family and friend referrals.



## SOLUTIONS

To reinforce organizational principles and further embed them into our culture, all managers complete Integrity Coaching® program. In addition to incorporating The Member Advantage (TMA) training into our on-boarding process for all staff, we have shifted the hiring process to focus on attitudes and beliefs aligned with member value creation. We have been implementing TMA and Integrity Coaching for over 10 years and we still see a spike in figures across the entire organization every time we complete the coaching program. From the call center customer experience surveys to our product sales from front office staff, we recognize the immediate effect that Integrity Coaching has on our people.



## SUSTAINMENT

We work with all our staff through the sales and servicing training, every Wauna CU employee graduates from the program, The Member Advantage We keep it exciting, with “branch wars”, to see which branch is superior. We meet monthly to discuss the MVPs of the month. We are constantly highlighting throughout the organization of our MVPs and the compliments and kudos our members have sent. A scoreboard of the top MVPs are highlighted at each location which increases confidence and provides friendly workplace competition.

We continue coaching opportunities by providing observations of our staff working with our members. This accountability activity and one-to-one coaching helps us keep the training fresh and builds the impact of the whole person.



*“There was a lot of negativity with regards to sales before we implemented Integrity Solutions. With Integrity Solutions, I was able to show my staff that by understanding the needs of our members is providing great service as well as meeting our sales goals.”*

**Robert Blumberg, CEO**

