Appointment University
For Credit Unions (CU)

The problem
Credit Unions already have the members and their trust. However, most still hold only a small number of products. That is not a technology or product gap. It is a human one.

Front-line teams hesitate to start conversations with people they already know. They do not want to sound salesy or as if they are taking advantage of the relationship. Scripts and cash incentives were supposed to fix that. They often create inauthentic conversations that strain the relationship — and silence on the line.

What AU is
A unique approach to overcoming contact reluctance. With use of simple parables and the power of self-awareness…marketing professionals learn to get past initial and temporary anxiety which allows their authentic voice to take over. This is an ideal fit for CU's who need to "sell" but fear the environmental hit to their role within the community.

The 15-Second Approach
A philosophy, not a script. Authentic, value-based conversations are started, and the member is heard before pronouncing a fit. The customer fully engages because they are asked to. The exposure drives the numbers, not language and scripts.

How it runs

- Teller core — about 20 minutes, on their own time
- Live Module 2 by for specifics (Q & A)
- Managers: live session on how to lead it
- Weekly Quarter Club — 30–45 minutes

Nobody is pulled off the line for half a day. New hires use the videos when they start.

Quarters
Five quarters. Each genuine 15-Second attempt moves one. The goal is five attempts — not five sales. Activity they control. Production is the byproduct.

Quarter Club Poker
Makes the attempt livable on the teller line.

- Every Quarter earns a card from a deck behind the line
- Five Quarters = a five-card hand
- Extra Quarters can replace a card
- Best hand at the end of the day wins a $25–$50 certificate to a local business — ideally a customer of the bank

- Optional: the manager slips a joker in the deck for an instant win

Rewards action, not results. Fun, social, local. Low cost. Simple to run across branches.

What the credit union gets
More conversations about what you already offer. Stronger relationships because members finally know what is available. A service culture instead of a used-car feel.

What AU does not do
Teach your products. Write your language. Set your incentive plan. Take a cut of a wealth relationship.

For details or a live session: AppointmentU.com