

Cathy Long, Business Development Manager

## **Where We Were Rough Waters A Strategic Challenge**

**1935 – Served only GTE employees and family members.**

**1980's – Accepted SEP Enrollments**

**1998 – Injunction Lifted – GTE FCU Mission, Vision, and Tagline born.**

**2000 – Started Ambassador program**

# **Navigating A Solution**

## **Our Mission:**

**We are a not-for-profit cooperative helping our member-owners build and secure their financial success.**

# **Navigating A Solution**

## **Our Vision:**

**First Choice for  
Financial Services**

# **Navigating A Solution**

**Our Tagline:  
*Together We're Better***

# **Navigating A Solution**

## **2002 - Our Challenge**

**Increase memberships by 13.7%.**

**Maintain 95% member satisfaction**

**Loan growth 9%**

**Share growth 12%**

# What We Did

- Focused on developing relationships with ambassadors
- Encouraged and looked for ways to build strong financial partnerships with our SEGs.
- Listened to ambassadors – met their needs and exceeded their expectations
- Developed a reward program to recognize our ambassadors efforts to promote the CU in the workplace and truly become our “partners.” – PassPoints
- Include every staff member and department in SEG program

# PassPoints™ Welcome Aboard

## Points-for-Rewards Program

Points	Activity
1,000	Direct mail from credit union to all SEG employees
1,000	Initial membership drive (New SEG)
750	Link to <a href="http://www.gtefcu.org">www.gtefcu.org</a> from company intranet site
750	GTE FCU sponsored event on-site at company (SEG)
500	Company newsletter or email promotions of GTE FCU
500	Ambassador is/becomes a GTE FCU Partner member
250	Envoy (SEG employee) is/becomes a GTE FCU Partner member
250	Refer a new GTE FCU Partner member
250	Ambassador supplies email address to GTE FCU
50	Display GTE FCU promotional posters in company work sites (monthly)
50	Distribute GTE FCU promotional payroll stuffers to all SEG employees (one per month)
50	Refer a new GTE FCU non-Partner member
50	Host a GTE FCU on-site visit at company (per event)

# PassPoints™ Welcome Aboard

Assistance and resources to navigate  
the Ambassadors to success:

- Monthly Posters & Payroll Stuffers
- Website including catalog of rewards

Upper Tier Rewards	Points	Middle Tier	Points	Lower Tier	Points
Laptop Computer	50,000	DVD Player	4,500	Movie Gift Certificate	625
Cruise Getaway (voucher)	50,000	Carryon Bag ( Samsonite )	3,125	GTE FCU logo shirt	625
Luggage 3-pc Set ( Samsonite )	16,250	Mall Gift Certificate	2,500	GTE FCU logo tote	500
Airline Tickets (2 roundtrip to domestic US)	12,500	Disney Park Tickets (2 adults)	2,500	GTE FCU logo cap	250
Digital Camera	12,500	Universal Park Tickets (2 adults)	2,500	Blockbuster Gift Card	250
Beach Resort Getaway (voucher)	10,000	Restaurant Certificate	1,250		
Garment Bag ( Samsonite Roller)	10,000				

# PassPoints™ Web Site



Password-protected  
Personalized  
information with  
activity monitoring  
of each Ambassador

# PassPoints™ Setting Sail

2001 Best Practice Award Winner

**Announcements!** Direct mail, Survey, Newsletter, Email, Invitation in a Bottle

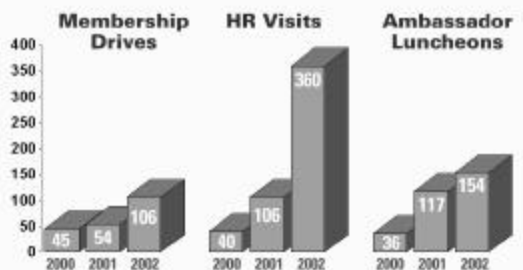
**All Aboard!** Luncheon aboard cruise ship  
Detailed mailer sent to non-attendees.

**Special Logo Gifts!** Tote bags, Polo shirts, Mouse pads, Stress balls & Binoculars

# PassPoints™ 2002 Results

SEG interactions more productive

## SEG Ambassador Handshakes 2000 - 2001 - 2002



Our 2002 goals exceeded

# PassPoints™

## 2002 Results


25,357 New Members (35% over goal)

95% Member Satisfaction

61 New SEGs (16 by merger)

95 More Ambassadors than 2001








53 Prizes Redeemed (over 103k points)



### 2002 SEGs of the Month

*"The online newsletter articles are a great idea." This refers to our new GTE FCU newsletter articles available on the PassPoints webpage for all ambassadors to copy and use in their newsletters.*

—Karen Jackson  
(AAA Auto Club South)

 <p>Walter Industries – Karie French</p>	 <p>Verizon Online Center – Kathleen Mannion</p>	 <p>PSCU Financial Services – Kim Weiherington</p>
 <p>KForce, Inc. – Amanda Franklin &amp; Barbara Spitaleri</p>	 <p>Avaya Communications – Linda Prignano</p>	
 <p>AAA Auto Club South – Karen Jackson</p>		



## 2002 SEGs of the Month



Verizon Wireless – Nancy Hannan, Lily Wu, Dee Torres



AAA Auto Club So. – Tom O'Brien



Telecommunication Services, Inc. – Cenia Paxton

*"After talking with several credit unions, we found that GTE FCU was the friendliest, the most helpful, and the one who could provide our employees with the best service.*

*—Amanda Franklin & Barbara Spitaleri (KForce)*



America II – Angie Koher



TECO – Alba Grillo



Honeywell – Gloria Jackson



## 2002 Ambassadors of the Month



Bonnie Conrad  
Ocean Optics



Ann Windsor  
Accent Marketing



Mary Ellen Palinkas  
Oscor, Inc.

*"Trust. I would say that trust is the main reason my family works with GTE Federal Credit Union for nearly all of our financial needs. We have been credit union members for more than 15 years..."*

*—Tracie Thompson (Honeywell)*



Lori Shelquist  
MLG Management



Ginny Leonhardt  
AAA St. Petersburg



Sherry Debevec  
AAA Tuscarawas Cty





## 2002 Ambassadors of the Month



Teri Murrell & Pam Schlegel  
Goodrich Hella Aerospace



James A. deVore  
AG Communication Systems



Alisa Ras & Susan Sirak  
Sypris Electronics

*"We were very excited to offer GTE Federal Credit Union's services to our employees... There has also been wonderful feedback on the credit union facilities. Employees say they feel like a person instead of a number because the tellers call them by name and the service is fast and friendly."*

*– Sarah Wood  
(America II Ambassador)*



Gloria Jackson  
Honeywell



Arlene Kennedy  
Verizon Data Services



Sharon Sanderbeck  
Med-Tech Labs



## Success!

