

First Tech Federal Credit Union

Credit Union Creates Additional Engagement to 20% of Key Accounts

Founded in 1952, First Tech Federal Credit Union serves the world's leading technology-oriented companies, such as Microsoft, Google, Amazon, and its employees. With 40+ locations, the credit union offers a full range of products and services, as well as individual tools to promote financial wellness.

Challenge

First Tech's VP of Membership and Business Development, Ed Powers, was on a mission to transform the business development team into successful B2B sellers and help account managers switch from a B2C to B2B mindset.

"We were looking to improve the mindset and skills. I wanted them to learn how to lead better conversations and uncover needs," explained Powers. "Because a lot of it has to do with mindset, they needed to adopt a new mentality and understand that they can control things more than they think."

Solutions

First Tech began an online search, interviewing various training providers, and partnered with RAIN Group, a global sales training and performance improvement company.

Prior to the training, participants completed a [Rainmaker Assessment](#) to measure business development competencies, skills, and behaviors. In addition, a Sales Effectiveness and Improvement Analysis was completed to determine the strengths and gaps of the team.

The team then completed an introductory online lesson to get familiar with the [RAIN conversation framework](#) and other key topics that would be discussed in the training.

"Our team learned they can't just assume someone is going to respond to email. They have to call them and explore other ways to connect. They're finding people with similar connections and asking for their help in making introductions. It might take a few more steps, but they're getting through and experiencing success. Their ability to effectively sit down with the C-suite has greatly improved, and the overall morale is better because our team feels they're more in control. The training changed our mindset and gave us the skills we needed to be successful B2B sellers."

Ed Powers, VP of Membership and Business Development, First Tech Federal Credit Union

RAIN Group delivered its 2-day workshop, [RAIN Selling: Foundations of Consultative Selling](#), to account managers, membership development specialists, and program managers. During the training, participants acquired skills to lead masterful sales conversations, build winning value propositions, uncover customer needs, handle objections, develop a compelling value case, and more.

Following the workshop, participants enrolled in [RAIN Mail](#), a mobile and email app that presents scenarios with multiple choices and delivers immediate feedback, and [online sales training](#) to reinforce training concepts.

"The reinforcement aspect was one of the key reasons we selected RAIN Group. The live training is just the start. We needed to keep it alive through the adoption process for our learners. The digital capabilities with gamification really stood out," shared Powers.

Results

Just six months after the training, First Tech had one of its best years and witnessed numerous positive results. Metrics include:

- Select Employer Group growth up 20% vs 5% the previous year.
- Account Managers created additional access/engagement to about 20% of key accounts they serve.