

UNLOCK YOUR SALES CONFIDENCE

Reflect, Strategize and Succeed

Whether you're new to credit union sales or a seasoned pro looking for a boost, this is your opportunity to reflect, strategize, and grow. Let's turn self-doubt into self-assurance and start closing more checking accounts and loans with confidence!

Rate yourself
on a scale of
1-5:

How well do I know my products/service?

How do I typically handle rejection?

How confident do I feel before a call or meeting with a member?

What actions will you continue, enhance, begin, or eliminate based on your ratings?

Looking to next week, list three items you must accomplish to advance your sales confidence?

1

2

3

As you put these strategies into practice, don't be afraid to celebrate your progress, no matter how small. Each moment of growth brings you closer to becoming the credit union leader you aspire to be.

Your next step? Keep using this worksheet to reflect on what works, adapt as needed, and keep pushing forward. Share your successes with a colleague or mentor – they might have insights to help you grow even more.