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CU*BASE “Sales Tracker” Streamlines Credit Union Marketing Efforts

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CU*Answers announced that it had recently added a dynamic companion for clients utilizing its enterprise CU*BASE system. The new Sales Tracker system creates a powerful tool for following up on member contacts and helping staff *close* the sale. The tool is designed to list all outstanding leads to be handled so that they can be steadily worked by any credit union staff member. CU*Answers stated that a key benefit is that the system maintains a running “progress report” of member contacts. These trackers are then electronically linked to specific Cross Sales tasks, so that final results on the follow-up can be tracked along with other cross-selling activity performed.

CU*Answers claims that the link between its Sales Tracker system and Cross Sales Tasks is strong:

- Sales Tracker entries provide the way to easily follow-up on many different issues – ranging from direct mail follow-up, answering questions presented to a teller, checking out a sales lead and more. CU*Answers educates clients to think of trackers as a “reminder” of what needs to be done.
- The CU*BASE Cross sales system is used to track the status of the member follow-up (contacted, application processed, not interested, etc.) performed. In essence, a “record” of events that have taken place – as well as providing a sales “prompt” to employees and a way to track, report and reward employees for their cross selling efforts.

CU*Answers said its Sales Tracker Leads and Follow-ups system focuses employee action on making sure they call the member, by providing a tracker that is automatically filled with the member’s home and work phone numbers.

About CU*Answers

CU*Answers was founded over 35 years ago and is a 100% Credit Union owned CUSO located in Grand Rapids, Michigan. CU*Answers offers a wide variety of services for credit unions including its flagship CU*BASE Processing System in both an Online (ASP) and In-house environment, Internet Development Services featuring the **It's Me 247** Online Banking product, Member Check Processing and Direct Deposit processing services. CU*Answers provides combined services to 165 credit unions nationally representing nearly 1.5 million members and \$8.8 billion in credit union assets. For more information about how “We Make Credit Unions Go” please visit CU*Answers at www.cuanswers.com.

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