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

### **Grand Rapids, Michigan – June 11, 2008**

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 than 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](http://www.cuanswers.com).

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