



PROCUCU 2024 Top 10 Take-Aways

- 1) **Record Breaking Attendance** – PROCUCU is growing! Lots of new program managers were in attendance this year, with great representation from women PMs!
- 2) **Create a Network of PMs** – Connect and Collaborate with like-minded programs; communicate regularly to help you explore ideas, gather feedback, and stay focused. Reach out!
- 3) **Build Relationships with your Call Center Reps** – Assign a financial advisor (or two) to the team for better referral generation.
- 4) **Marketing to Retirement** – Plan a branch-wide retirement party to promote retirement investment solutions. Consider offering all members turning 50 a Financial Plan.
- 5) **Create a Value Proposition for your FAs** – Include all the nuance in running the program that they don't usually see, including the benefits of working for the credit union versus being independent.
- 6) **Elevate your Recruiting** – Recruit 24/7 and create a repeatable process. When hiring million-dollar producers, bring in the C-Suite.
- 7) **Career Path** – Let your team know what the next step is on their career journey and help them get there. Look for coaching opportunities and consider six- or twelve-month scorecards including intangibles and professional development.
- 8) **Request for Proposals (RFPs)** – While there is no perfect time to RFP, it's a healthy part of running a successful program. Know what to ask for and be transparent about what you want for the future of your team.
- 9) **Leverage Technology to Innovate** – Find out what your team wants and what they will use. There are options to help bring efficiency and sales to your program, especially for those smaller accounts and younger clients.
- 10) **"Fu bu guo san dai"** – 90% of wealth is lost by the 3rd generation. Philanthropy can connect generations by passing along values.