


Module 5: Customer Relationship Management

Creating your Credit Union Strategy Road Map on CRM



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Key Terms

- Strategy – a large scale plan to achieve the goal
- Tactics – specific procedures and tools you use to implement strategy.



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What is our Goal in CRM?

Creating, maintaining, and expanding mutually beneficial member-customer relationships.



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What you need to prepare for the exercise?

- Assessment of your credit union's process or tools to build relationship with your members (sample)
- Summary of you goals, strategy statements and some suggestions on tools and programs on CRM



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Your meeting

• How long?

As a rule of thumb, creating your CRM strategy warrants about the same amount of time you spent creating your business plan.



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Exercise 5

• Identify potential strategies



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Strategy Selection Matrix


	Criteria 1	Criteria 2	Criteria 3	Criteria 4	Criteria 5
Strategy 1	x				x
Strategy 2	x		x		
Strategy 3	x	x	x	x	x
Strategy 4		x	x	x	
Strategy 5	x	x	x	x	

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Tactics to Implement CRM Strategies

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Exercise 6

- Prepare the credit union CMR Strategy and Tactics worksheet

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