



Be An Ideal Team Member

Whether you serve in a traditional branch, storefront, on site, or in store location, your branch's success begins with how well you serve one another. When teammates invest in each other first, customers, members, shoppers, and even retail partners feel the difference. Use the guidelines below to build a winning culture every day.

Understand Your Role

- Every position, including Teller, Member Service Representative, Universal Banker, and Branch Manager, directly impacts branch success.
- The attitude you bring to your responsibilities sets the tone for the whole team.
- Look for moments to assist teammates, share knowledge, and create new opportunities to connect with customers, members, and shoppers.

Highlight One Another's Strengths

- Call out the positive. A quick comment like "I love how clearly you explained that product!" builds credibility and confidence.
- Public praise encourages teammates to keep leaning into their strengths.
- As strengths become visible, the entire team and your branch's guests benefit.

Measure Progress Together

- Set shared benchmarks for professional growth such as sales goals and service scores, along with personal development such as training certifications and leadership skills.
- Schedule periodic check ins to review results and adjust goals.
- Celebrate milestones, both large and small, to keep momentum high.

Make It a Team Effort

- From community day fundraisers to lobby promotions, invite everyone to contribute ideas, vote on the best concepts, and take ownership of tasks.
- Clear roles and shared accountability create smooth execution and stronger results.
- When the project wraps, debrief together and recognize contributions.

Motivation Drives Loyalty

- Share the spotlight. When goals are met, credit the team first.

- An engaged and appreciated team stays longer and builds deeper relationships with customers, members, and retail or community partners.
- Strong team retention leads to more consistent service and stronger branch performance.

Connect Beyond the Counter

- Schedule periodic team moments such as morning coffee huddles, potluck lunches, quick service skill challenges, or volunteer projects.
- Personal connections build trust that shows when lines get busy or goals become more demanding.

Quick Team Builder Ideas

Five-Minute Wins

Greet & Repeat: After any teammate helps a guest, echo the guest's name once more so the whole team remembers it.

Tag-In: If you finish early, ask, "Who needs a hand?" and jump in for the next task.

High-Five Huddle: End the day by sharing one success from each person.

Why They Matter

- Reinforces personal service and keeps the lobby friendly.
- Encourages teamwork and keeps wait times low.
- Builds morale and positive closure.

A strong branch culture does not happen by accident. It is built every day through teamwork, mutual support, and a shared commitment to serving one another as well as those we serve.