Written perspective · Grow

Repairing the conversion leak

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A written perspective on where lending opportunities can lose momentum between a useful signal and staff follow-through.

What leaders should take away

- Growth opportunities are often visible before they are acted on.
- Frontline teams need a relevant next step, not another disconnected alert.
- Leadership needs to see which actions change the outcome.

The original video is no longer available. This written perspective preserves the topic; it is not a transcript or a replacement recording.

The central idea

An institution may already have a useful member signal and product guidance, yet struggle to connect them to staff follow-through.

For some institutions, the constraint may be follow-through rather than demand. Establish where the work slows before deciding what to change.

What governed activation changes

A governed approach connects the signal to approved guidance and a staff-owned next step. Recommendations remain bounded by policy and visible to the person responsible.

Track which opportunities received attention, which actions were completed, where follow-through slowed, and whether available outcome records show a change.

Trace the lending path

Choose one supported opportunity source. Identify who reviews the context, who owns member follow-up, how a pending application reaches the next system, and which record confirms the outcome. A ShiftMate application and an external LOS submission are separate stages. Engagement status alone does not establish approval or funding.

The current lending product example shows synthetic data and the boundaries of the illustrated workflow.

Use the proof-of-value guide to define the baseline and evidence for one follow-through problem.

See how staff follow up on lending opportunities: See the lending product example.