

Sb1 FCU Uses fiVISION's memberWORKS as Member 'Onboarding' Tool

fiVISION

web: www.fivision.com
phone: 317.612.3350
mail: 3500 DePauw Blvd.,
Suite 2051
Indianapolis, IN 46268

INDIANAPOLIS, IN — October 26, 2009 — When new members join credit unions, it's well known that this time period is essential in selling them certain products and services that will meet their financial needs. To accomplish this goal, credit unions are in constant contact with their new members to induct them into the credit union and all its offerings – a process called “onboarding.”

Sb1 Federal Credit Union (\$490 million; 32,881 members; Philadelphia, PA) was searching for a tool to facilitate its onboarding process and has signed with fiVISION, a CRM solutions provider that enables enhanced member service and sales for credit unions, to use the company's memberWORKS product as a contact management system to support this process. Sb1 goes live with memberWORKS in early November 2009.

fiVISION's memberWORKS (<http://tinyurl.com/yj3o6v4>) offers a collection of individual modules designed to address credit union desires to enhance service and sales capabilities. These modules work seamlessly together and can be deployed in almost any configuration to fit a credit union's specific needs. As a result, memberWORKS helps a credit union's staff become more responsive and more productive while giving them the support tools they need to effectively sell products to members.

At Sb1, fiVISION's memberWORKS will be used at this point as a stand-alone contact management system tailored specifically to SB1's onboarding needs.

“Our onboarding process with new members is an absolute crucial time in exposing them to the credit union's product offering to benefit their individual needs. So any tool we can use to enhance this opportunity, I'm going to take a serious look at it,” states Tom Swerzy, CEO of Sb1 Federal Credit Union. “A tool like this helps our staff remain in contact with the new members, keeping them organized and enabling them to track what's been offered and what hasn't. It's a very important time to get the new member off on the right foot, and we're pleased to have partnered with fiVISION to leverage memberWORKS in this fashion to achieve our goal.”

At fiVISION's suggestion, part of Sb1's onboarding process has been transformed into a living “member profile” asking questions about their life events to better understand their needs for improved target marketing. This profile can be updated periodically with members as time goes on.

“Staying in touch with members is always an important objective in fostering stronger member relationships,” says Mike Winter, president of fiVISION. “Keeping in

Media Contact:

Mike Lawson
DML Communications
760.753.5943
mike@dmlcommunications.com

(more)

PRESS RELEASE

touch with them at such a crucial time as the first few weeks of being a new member is so important. Using memberWORKS as a contact management system for Sb1 Federal Credit Union in this instance displays the versatility of the technology. We are thrilled to see this unique use of memberWORKS to help Sb1 properly build better relationships with its new members – and ultimately help them grow.”

About fiVISION

fiVISION provides technology platforms that enable enhanced member service and sales for credit union clients through its flagship CRM product memberWORKS and accountWORKS member enrollment solution. fiVISION, headquartered in Indianapolis, Ind., is a CUSO that was established to bring industry leading – and practical – contact management, cross selling and workflow automation technology solutions to progressive credit unions. For more information, contact fiVISION at 317.612.3350 or visit www.fivision.com.

###

fiVISION

web: www.fivision.com
phone: 317.612.3350
mail: 3500 DePauw Blvd.,
Suite 2051
Indianapolis, IN 46268

Media Contact:

Mike Lawson
DML Communications
760.753.5943
mike@dmlcommunications.com