



SPOTLIGHT

Credit Union 1 Declares Its Total Expert and Salesforce Integration a “No-Brainer”



Credit Union 1



Committed to helping more people achieve their economic potential, Credit Union 1(CU1) serves more than 85,000 members across 14 branches in Illinois, Indiana, and Nevada and many more nationwide via its highly rated mobile app, 30,000 surcharge-free ATMs, and 5,000 shared-branch locations.

At a Glance

The Situation

Credit Union 1 wanted each of its loan officers to work like they were the CEO of their own world, stepping beyond traditional outreach efforts to engage leads and enhance their member experiences.

The Solution

An integration between Total Expert and Salesforce enables each CU1 loan officer to easily build their individual brand and marketing presence while more efficiently tending to the routine sales and marketing tasks that used to take up too much of their time.

The Success

- Better efforts to grow member share-of-wallet
- More leads and opportunities
- Differentiation as a partner and employer

“In mortgage lending, every connection we make today is a potential refinance tomorrow. When the market shifts suddenly away from purchase, a platform like Total Expert can help credit unions like us quickly shift to cross-selling other products and services, like deposit accounts.”

Jennifer Poniatowski,
Vice President of Mortgage Sales

The Situation

When Credit Union 1 (CU1) executives decided in 2019 that existing sales and marketing processes needed a complete digital transformation, they came up with a unique way to vet the best ideas. They secluded all business unit leaders at an offsite retreat, then required each one to develop and present a plan – “Shark Tank”-style – outlining exactly how they would grow their unit if budget weren’t a factor.

It was then that Vice President of Mortgage Sales Jennifer Poniatowski pitched her idea for how to enable CU1’s retail loan officers to easily build their own, individual brands and marketing presences while more efficiently tending to the routine sales and marketing tasks that took up too much of their time: she wanted each of CU1’s loan officers to work like they were the CEO of their own world, stepping beyond traditional outreach efforts to engage leads and enhance their member experiences.

It was a winning idea. But before Jennifer could activate it, CU1 had to equip its loan officers with the right digital tools. To use Salesforce as CU1’s global CRM across all business units as planned, Jennifer knew they’d have to augment it with technology that could give loan officers the powerful, self-service email marketing capabilities they really needed.



The Solution

After a trusted colleague at another credit union told Jennifer about Total Expert's strengths in the financial service industry, she did her own due diligence. Then she quickly selected Total Expert as the marketing platform CU1 would pair with its Salesforce CRM and member engagement platforms.

Using Total Expert, CU1 quickly connected key sources of data, gained a more holistic view of member data and distributed automated, self-service email marketing capabilities to each CU1 loan officer, so they can deliver more personalized messaging that resonates in a much stronger way.

“Every business unit is part of our marketing efforts. With data flowing back and forth between our Salesforce integration with Total Expert, it gives us an opportunity to make sure that we are curating not just the mortgage transaction but the entire member experience across our credit union.”

Jennifer Poniatowski,
Vice President of Mortgage Sales



“Credit unions and mortgage companies won’t survive without modern financial marketing technology like Total Expert. It’s the only way to meet consumers where they are, be the trusted financial advisor they seek, and help them become able to better achieve their financial goals.”

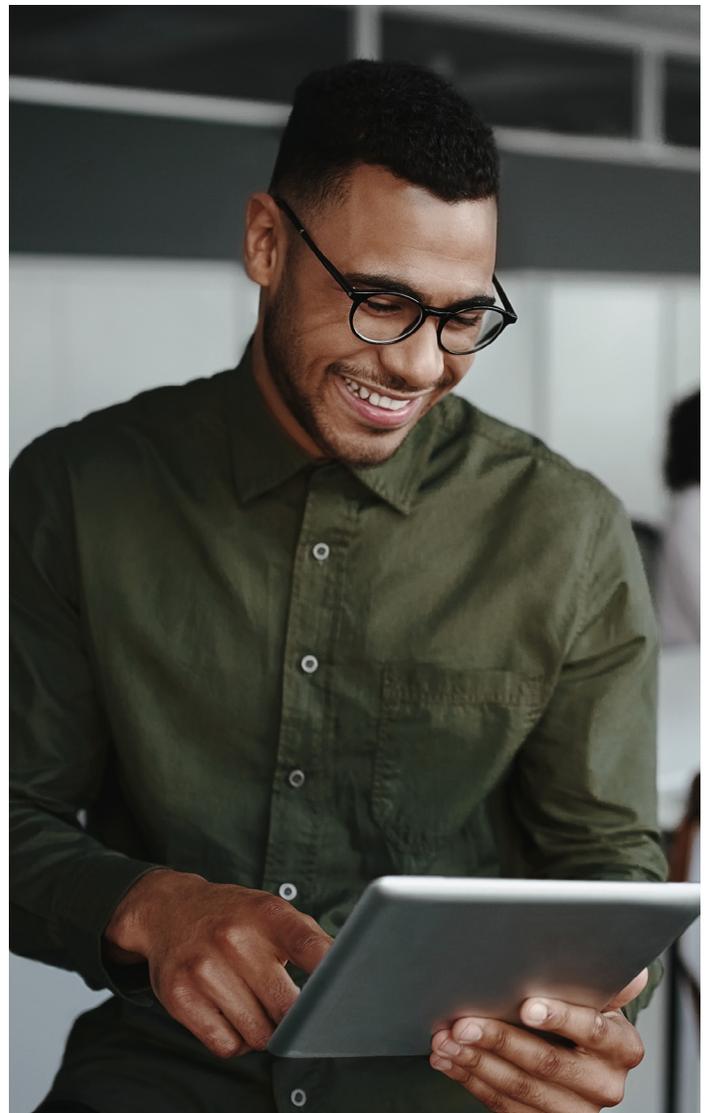
Jennifer Poniatowski,
Vice President of Mortgage Sales

Success

Now, with the new Total Expert/Salesforce integration, CU1’s loan officers are doing a much better job cross-selling and strengthening relationships with new and existing credit union members. They’re also easily surfacing new leads and opportunities before they slip through the cracks, better marketing their personal brands on social media, making themselves better known in specific markets in more efficient ways, and even resurrecting old-school tactics like co-hosting open houses and sponsoring mixers with realtor partners – co-marketing activities that no longer need to be time-intensively managed via spreadsheet.

The credit union has also found Total Expert to be a significant draw when attracting new realtor partners and prospective loan officers.

Given its massive success to date, CU1 plans to expand the use of Total Expert to other business units and is also considering ways to use Total Expert to co-market its products and services to other types of banking partners.





About Total Expert

Total Expert is the leading fintech software company that delivers purpose-built CRM and customer engagement for modern financial institutions. Total Expert unifies data, marketing, sales, and compliance solutions to provide a cohesive experience across the customer lifecycle. Total Expert turns customer insights into actions to increase loyalty and drive growth for banks, lenders, credit unions, and other financial services firms.