

# CASE STUDY: SILVER STATE SCHOOLS CREDIT UNION

LAS VEGAS, NV



## SILVER STATE SCHOOLS CREDIT UNION (SSSCU) OVERVIEW

FOUNDED: 1951

EMPLOYEES: 200+

BRANCHES: 9 in Nevada, 5,000 within CO-OP Shared Branch Network

MEMBERS: 54,000+

ASSETS: \$780+ Million

### PRODUCTS AND SERVICES:

Complete Banking Services (Checking, Savings, CD, Money Market, IRA)

Loan Services (Mortgages, Vehicle Loans, Employee Educational Loans, Business Loans, Personal Loans, Lines of Credit, Credit Cards)

Investment Services (Retirement Planning, Investment Portfolio Analysis, Estate Planning)

## TESTIMONIAL

"CRMNEXT's solution makes transactions more efficient, allowing more time and better information for staff to focus on customized service delivery. Our commitment to technology with CRMNEXT is about enhancing the relationships we have with our members."

Mike Randall, SVP/COO, SSSCU

## GET IN TOUCH

For more information or to request a private demo or personalized workshop, please contact:

Email: [info@crmnext.com](mailto:info@crmnext.com)

Phone: (833) CRM-NEXT

Website: [www.crmnext.com](http://www.crmnext.com)

Address: 3 Hamilton Landing, Suite 200  
Novato, CA 94949

## SSSCU CHALLENGES

### MULTIPLE COMPLEX AND MANUAL WORKFLOWS

- Too much manual effort required, leading to process inefficiency
- Branch and call centers wasted time re-keying information, limiting opportunity to deepen member relationships
- Lacked a way to view entire workflow for any process

### DISPARATE APPLICATIONS CUMBERSOME TO USE

- Too many systems for branch and call center users to interact with, resulting in frequent log-in expirations
- Multiple, stand-alone applications, requiring constant screen toggling
- Servicing interactions needed to be re-keyed because they were tracked in different systems

### HARD TO PROVIDE RELEVANT AND PERSONALIZED OFFERS

- Member information was stored in fragmented systems preventing holistic member view
- Unable to recommend relevant cross-sell products due to analytic gaps

### TRAINING NEW EMPLOYEES WAS EXTREMELY CHALLENGING

- Multiple applications and systems of record made training complex and time-consuming
- Recruiting and retaining employees difficult; complicated systems and inefficient processes not conducive to job fulfillment

## CRMNEXT SOLUTIONS

### PERSONALIZED MEMBER SERVICE

- Member Support Representatives (MSRs) have up-to-the-minute knowledge of all prior customer interactions without need to switch screens
- Enhanced capabilities for customer welcome, personalized communications and member feedback surveys

### INSIGHT-DRIVEN OFFERS; CLOSED-LOOP LEAD MANAGEMENT

- Unified and holistic member view turns MSRs into financial consultants
- More productive marketing campaigns with higher conversion rates facilitated
- Leads created and tracked to completion with minimal effort or complexity

### HIGHLY EFFICIENT STAFF; TRAINING MADE EASY

- Reduced training time for new employees who learn one intuitive CRMNEXT platform instead of complicated core language and multiple applications
- Streamlined workflows will be easy to track and follow, increasing efficiency
- Cross-channel communication is easily facilitated
- Branch and call center staff can handle member needs quickly and efficiently

## CRMNEXT CAPABILITIES EMPLOYED

- **Bi-directional Integration: "Do," as well as "View"**
- **Codeless Customization: Simplifies Change Management**
- **On-premise Deployment**
- **Integration with Symitar Core and Other Key Systems**
- **Secure Architecture Integrated with Existing Identity and Access Management**