

Engage for Credit Unions

CRM Built Specifically for Credit Unions, Designed by Industry Experts, Powered by Microsoft Dynamics 365



Take a Holistic Approach That Puts Your Members First

Hitachi Solutions' Engage for Credit Unions gives you a complete, holistic view of member information so you can focus on providing a superior member experience. Provide responsive service that wins loyalty and offer financial products and services that are tailored to your members' needs

Engage for Credit Unions enables you to:

- Gain a complete, 360° member view, including complete profile, accounts, financial products owned, and household information
- Better engage members and the community with proactive communications, tailored offers, and marketing management
- Improve the efficiency and effectiveness of your member service center by consolidating service data and tools into a familiar interface

Industry Specific Modules

With three out-of-the-box credit union specific modules, Engage for Credit Unions enables your team to focus on all aspects of their business and the customer lifecycle, from relationship and engagement management to business development.



Member Management Module

Win members for life by providing a superior member experience. Member Management gives everyone the information and tools they need to put the member first, whether in the branch, service center, or back office.

- **Member 360**
Gain a 360-degree view of member information, including profile, household, financial products owned, and complete interaction history
- **Partner Management**
Build strong relationships with partners and centers of influence such as attorneys and realtors, creating a strong network of advisors and referrals
- **Householding**
Clearly understand the relationships between your members, including family, head of household, and business connections so you can serve their needs better



Member Service Module

Enable service representatives to resolve member issues quickly and efficiently with consolidated tools and a complete view of member information. Reduce staff churn by giving contact center personnel greater impact through tools that are easier to use.

- **Service Resolution**
Speed resolution and improve satisfaction with streamlined tools
- **Referrals**
Track and measure referrals from external sources and across lines of business
- **Process Automation**
Provide automated flows that ensure fast, accurate completions of common financial processes and member requests
- **Telephony Integration**
Deliver complete member information to the service rep automatically with every call



Business Development Module

Increase your member base and provide valued products and services that are aligned to your members' needs. Launch effective marketing campaigns and trace results back to specific marketing initiatives and expenditures.

- **Lead and Opportunity Management**
Help to ensure fast and consistent follow-up on every lead so you can continually grow your member base
- **Campaign Management**
Plan and execute marketing efforts more efficiently with campaign automation tools that are consistent and integrated
- **Cross-sell and Up-sell**
Deliver compelling offers that are tailored to each members' financial needs and aspirations
- **Reporting and Analytics**
Identify opportunities and accurately measure the results of your marketing spend

Why Hitachi Solutions

We offer deep industry expertise combined with decades of experience providing high-value solutions that deliver rapid return on investment. Our approach is designed to give you a faster, lower-risk implementation and rapid adoption through proven best practices.

- It starts with core technologies built on Microsoft Dynamics 365 so you can get up and running quickly
- We extend that with our own industry modules that give you capabilities tailored to the needs of the banking industry
- Finally we deliver a customized solution to provide the best fit for your business so you can focus on your unique strengths, not on basic technology

GET STARTED. REQUEST A CUSTOMIZED DEMO.

Interested in learning more about Engage for Credit Unions? Get a customized demo to see how you can re-invent your business solutions.



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