



Location: Melrose, MN

Founded: 1939

Employees: 347

Branches: 22

Members: 71,842

Assets: \$1.5 Billion



“We selected CRMNEXT as our CRM partner because they are laser-focused on helping credit unions grow their brand and financials, constantly evolving their product to make our employees more efficient and effective. The solution enables and delivers predictive and prescriptive analytics to grow sales, and is architected to allow low-resistance integration with other credit union systems. Plus, the personnel at CRMNEXT that we deal with have a history of working for and with credit unions.”

- Neal Kaderabek, Chief Digital Information Officer

Challenges to Solve

- Lack of integration between the core and third-party systems
- Visibility into member interaction across departments
- Solving for commercial lending
- Managing a CRM without code from Salesforce

Evaluation Criteria

- Core system integration
- Easily customizable for specific needs and use cases by role
- 360 view of members relationships
- Data-driven, next-best product recommendations
- Streamlined workflows and automation functionality

CRMNEXT Solution

- Call Center Integration
- Campaign Management
- Case Management
- Complaint Management
- Employee Dashboard
- Keep-in-Touch
- Lead/Referral Management
- Member 360
- Member Action Center
- Pre-approved Offers
- Reports
- Share/Loan 360
- Share/Loan Action Center
- Target Setting
- User Administration

Integrations

