

Deeper Member Insights and Managed Services for Baxter Credit Union

Baxter Credit Union (BCU) is a \$3.5 billion full-service, not-for-profit, financial institution providing SEG and community banking to over 200,000 members in all 50 states and Puerto Rico. BCU is noted for setting new standards in bringing together technology and member service in the fast-changing world of financial services.



Growth leads to growing pains

BCU has experienced tremendous growth, due in part to its ability to acquire and retain members by establishing personalized and relevant relationships.

Due to outdated tools and siloed information, key metrics were hard to track, as insights into their members were siloed. It was also difficult to correctly match activities and actions to the corresponding members who made them.

BCU knew they needed an updated solution that not only improved project management and pipeline tracking, but made it easier to monitor member activity and track their overall enterprise health.

Phases with a focus

BCU engaged Silverline to implement the following Salesforce products:

- Financial Services Cloud
- Sales Cloud Einstein
- Shield Platform Encryption, Event Monitoring, and Field Audit Trail

By implementing the Salesforce Platform, BCU now has a more unified view of members, which enables a better understanding of each member and their relationship with the credit union.

“ It was clear to us that Silverline had a deep commitment to the Financial Services industry, understood where we were coming from...and they were extremely patient and reliable. ”

John Sahagian, Chief Data Officer, BCU

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Additionally, BCU can easily view and act on recommendations provided by the Salesforce Platform, as well as related activities and actions to its members. They also have the ability to increase member engagement via intelligent relationship information and connections into other BCU data sources.

BCU has gained efficiencies by automating manual processes, which reduces the need for multi-system navigation and surfaces key information about prospective and existing members.

Silverline is using a targeted, phased approach for implementing the solution across the enterprise. The first phase focuses on Marketing and Sales business units with a goal of gaining a 360-degree view and providing a relationship hierarchy in order to perform: Opportunity management, referral management, onboarding, and product white spacing identification. The next phase will focus on Service business units.

Ongoing support with managed services

By constantly driving toward its goal, BCU recognizes that ongoing support and building enhancements will be necessary. BCU engaged Navigator, Silverline's Managed Services offering, to build on the Member Experience Platform delivered during the first phase. Navigator provides BCU with strategic, tactical, and iterative customizations to their Salesforce Platform while continuing to evolve the business processes through technology.



“Silverline’s managed services benefits me as a product manager: to be able to supplement my team instead of having to hire a full-time resource.”

Don Kotek, Senior Manager, Enterprise CRM Experience, BCU

About Silverline

With significant expertise in the Financial Services industry, including banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies, Silverline combines Strategic Advisory, technical implementation, and ongoing Managed Services to enable organizations to achieve maximum value with the Salesforce platform.

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