



## CASE STUDY

# Revolutionizing Member Experience: OneClick Financial's Personalization Strategies Elevate Five Star Credit Union's Satisfaction Levels

### MISSION

Five Star Credit Union focuses on empowering members with personalized tools for financial success. The credit union aimed to address challenges related to budgeting, financial education, and insights derived from data. The goal was to enhance communication, understand members' unique needs, and collaborate closely to deliver customized solutions. The overarching objective was to pave the way for members to achieve financial success and realize the life they aspired to lead.

### BUSINESS OBJECTIVES

- Develop a lead generation process to identify and cater to members' financial needs proactively.
- Enhance member services by offering a very strategic personalized encompassing financial experience.
- Provide valuable content to assist members in evaluating and adopting the financial solutions offered by Five Star Credit Union.
- Assist members in achieving their financial goals through data insights.

### DEPLOYMENT OF ONECLICK FINANCIAL BY RESEDA GROUP

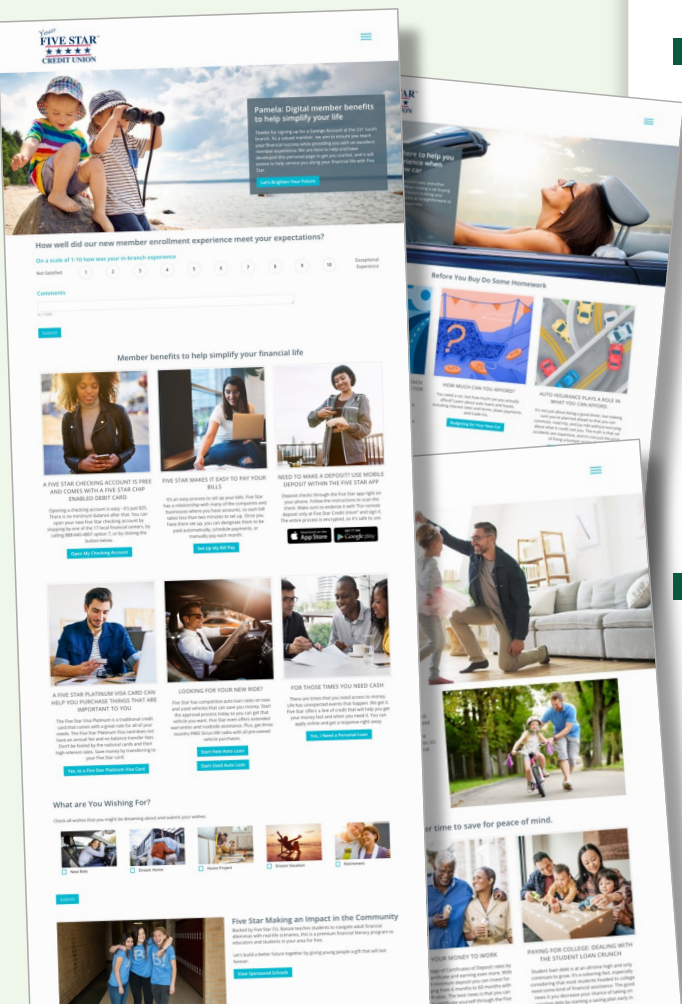
Personalization on OneClick Financial by Reseda Group is a strategic approach that leverages daily aggregated data, segmentation, personas, marketing criteria, and communication cadence to provide members with a highly customized and relevant financial experience. OneClick Financial ensures that members interact with content that aligns with their unique financial goals and preferences, ultimately enhancing their overall satisfaction and engagement with the credit union.



\$1 Billion in Assets

56,000+ Members

The credit union was founded in 1964. Five Star Credit Union is a not-for-profit financial institution that serves members in 28 counties across Alabama and Georgia.



## KEY FEATURES OF ONECLICK FINANCIAL BY RESEDA GROUP

**Personalized Content:** Members are served customized content, including surveys, articles, interactive tools, & offers.

**Budgeting Tools:** OneClick Financial enables members to meet their financial goals by providing interactive calculators for estimating payments or budgeting.

**Financial Recommendations:** The platform ensures members receive highly relevant information about their financial situation and goals and personalized recommendations in the form of offers, rates, types of loans and services to help members achieve their financial goals.

**Debt Management:** OneClick Financial takes a proactive approach. The platform refrains from displaying loan content if a member's credit score falls below a specified threshold. Instead, it offers educational resources, tools, and an appointment scheduler. This empowers members to actively address debt management, aiming to lower their debt and improve their credit score.

**Growing Deposits:** The platform offers deposit options to help members grow assets along with the next-best product, helping members make informed beneficial financial decisions.

### IMPACT ON MEMBERS:

**Improved Financial Literacy:** A significant improvement in member financial literacy as they better understand their financial situation and receive guidance on making informed financial decisions. **74 actions towards financial literacy.**

**Enhanced Engagement:** Members are more engaged with their financial accounts, leading to increased account retention and loyalty to Five Star Credit Union. **535 leads generated.**

**Better Financial Outcomes:** Members harbor tangible improvements in their financial well-being, such as reduced debt, increased savings, and improved credit scores. **33 members actively looking to lower debt and improve their credit score.**

### BENEFITS FOR FIVE STAR CREDIT UNION:

**Member Satisfaction:** Five Star Credit Union has improved member satisfaction with the help of OneClick Financial, as members appreciate the credit union's commitment to their financial success. **82 NPS score from 608 satisfaction surveys.**

**Competitive Edge:** The innovative financial personalization tool giving Five Star Credit Union a competitive edge in attracting new members and retaining existing ones.

**Data-Driven Decision-Making:** The credit union now has valuable data insights, allowing it to make informed decisions about product offerings, marketing strategies, and member engagement initiatives. **1,480 engagement actions taken.**

**CONCLUSION:** Five Star Credit Union's deployment of OneClick Financial is a game-changer in member personalization.

## ■ FIVE STAR CREDIT UNION FIRST 60-DAY RESULTS

**535** Leads Generated

**101** Auto

**107** Mortgage

**46** Home Equity

**69** Personal Loans

**4** Credit Card

**161** Deposit

**49** Checking

**51%** email Open Rate

**34,340** emails tailored to members' goals, interests, and engagement

**6%** Click-Thru Rate

**2.5x** better click-thru rate than industry average

**2,226** Unique Visitors

to member Personal Web URL Pages (pURLs)

**2,702** Visitors to pURLs in 60 days

**67%** of Members are telling us what important financial life event is happening through the use of surveys

**79%** of unique member pURL engagement came through Mobile. **21%** thru Desktop making integration with mobile banking app an essential factor in personalization



**ONECLICK  
FINANCIAL**

BY RESEDA GROUP

Contact us now and find out how we can help you.  
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