



CASE STUDY

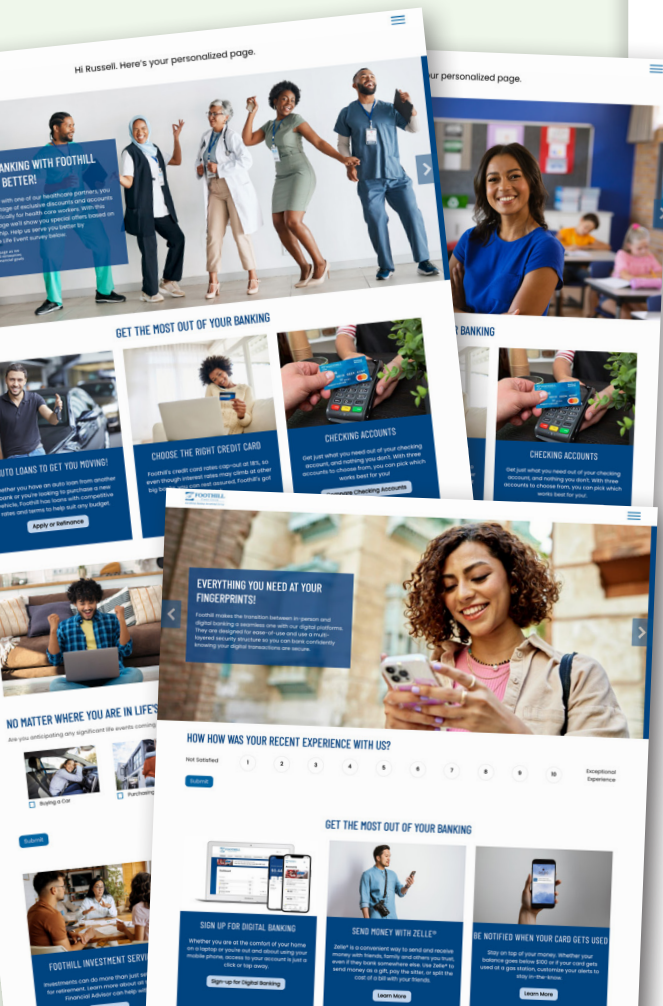
Foothill Credit Union Embarks on a Personalization Mission to Elevate Members' Financial Well-Being



Exceptional Banking. Exceptional Service

- \$824 Million in Assets
- 33,068+ Members

Foothill Credit Union was founded in 1958 and serves over 280 Select Employer Groups (primarily Education and Health Care) in the San Gabriel Valley of Southern California.



MISSION

At Foothill Credit Union, our core mission revolves around elevating the financial health of our members on their journey to financial success through a dedicated focus on addressing budgeting hurdles and providing comprehensive financial education. Central to this mission is our commitment to leveraging data insights, allowing us to enhance communication, understand the distinctive needs of our members, and foster close collaboration. By actively listening to our members, we tailor our approach to deliver personalized solutions, creating a pathway toward lasting financial success in their lives.

BUSINESS OBJECTIVES

- To build lifelong member financial health through exceptional member relationships and community service.
- Implement data-driven strategies to anticipate and respond to members' evolving financial needs.
- Develop a lead generation process to proactively identify and address members' financial needs.
- Establish support mechanisms to guide members in their journey to achieve financial goals.

DEPLOYMENT OF ONECLICK FINANCIAL

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.

KEY FEATURES OF ONECLICK FINANCIAL BY RESEDA GROUP

Tailored Content: Members gain access to personalized content, encompassing surveys, articles, interactive tools, and exclusive offers.

Financial Planning Tools: OneClick Financial empowers members with interactive calculators to efficiently assess and set financial goals.

Personalized Recommendations: The platform delivers tailored suggestions, including offers, rates, various loan types, and services, guiding members toward achieving their life event goals and aspirations.

Debt Management Strategies: OneClick Financial employs discretion by withholding loan content if a member's credit score falls below a specified threshold. Instead, it offers educational resources, tools, and an appointment scheduler for consultations with advisors, aiming to assist members in reducing debt and enhancing their credit scores.

Growing Deposits: The platform introduces deposit options to boost assets and recommends the next-best product, aiding members in making well-informed financial decisions.

IMPACT ON MEMBERS

Enhanced Financial Literacy: Members experience a significant boost in financial literacy, gaining a better understanding of their financial situation and receiving guidance for informed decision-making. **24 members viewed webinars.**

Increased Engagement: Members actively engage with their financial accounts, increasing account retention and strengthening loyalty to Foothill Credit Union. **121 leads generated in first 30-days.**

Positive Financial Outcomes: Members witness tangible improvements in their financial well-being, with options for increased dividend rates and investment services. **61 members actively looked at deposit options and investment services.**

BENEFITS FOR FOOTHILL CREDIT UNION

Improved Member Satisfaction: Foothill Credit Union has improved member satisfaction rates, reflecting the credit union's dedication to the financial success of its members. **80 NPS score from 128 satisfaction surveys.**

Competitive Edge: This innovative financial personalization tool positions Foothill Credit Union with a competitive edge in attracting new members and retaining existing ones.

Data-Driven Decision-Making: Foothill credit union now leverages valuable data insights, enabling informed decisions regarding product offerings, marketing strategies, and member engagement initiatives. **1,724 engagement actions taken.**

Conclusion: Foothill Credit Union's implementation of OneClick Financial emerges as a transformative force in harnessing data and crafting a personalized, data-driven financial experience.

FOOTHILL CREDIT UNION FIRST 30-DAY RESULTS

121 Leads Generated

63% average email Open Rate
28,969 emails tailored to members' goals, interests, and engagement

7% Click-Thru Rate
2.5x better click-thru rate than industry average

1,164 Unique Visitors
to member Personal Web URL Pages (pURLs)
1,498 Visitors to pURLs in 30 days

105 Members are providing us
with additional important financial life events
happening through the use of surveys

1,724 unique member
click actions on personalized content



**ONECLICK
FINANCIAL**
BY RESEDA GROUP

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