

Solutions for Credit Unions



The credit union business is all about relationships, as every customer is both a member and an owner. So, retaining and satisfying members, improving member services, and continually creating and enhancing member value is critical. However, gaining a solid understanding of your members' needs, wants and concerns on an ongoing basis can be a challenge. Fortunately, Allegiance can help.

Keep your members—and keep them happy

Building relationships with your members that last and providing them with more value starts with knowing and gaining a better understanding of their needs and concerns. And this means getting and staying in the know about what they're thinking and feeling on an ongoing basis—before it's too late.

For instance, are your members unhappy in any way? Did an employee treat them unfairly? What are the specific factors that cause your members to stay or leave? Which of your organization's offerings and programs matter most to your members, by priority, so that you can continue to do more of those things?

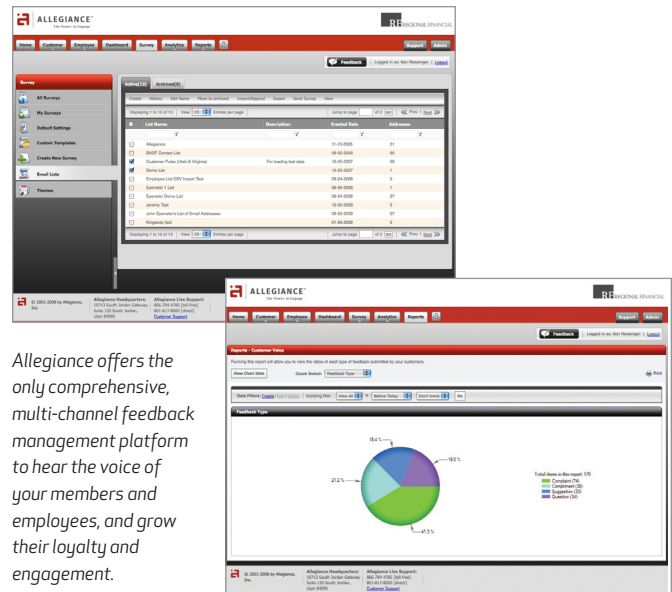
Unfortunately, many credit union leaders today hear, often too late, about member concerns or issues. Or worse, sometimes crucial concerns aren't being heard by the right people at their organization. The key is to set up two-way communication channels with your members, and turn up the volume on what they're saying.

All the tools that you need to listen

In the past, listening to members meant surveys, comment cards, phone transcripts, and even random letters and emails. While definitely a valuable source of information, data collected in the traditional manner is cumbersome to manage and even harder to analyze. By the time feedback is organized and redirected, the moment your member was reviewing has passed—and so has your opportunity to provide your members with a more positive experience. But there is a better way. Allegiance has the answer.

"Our brand has been ranked the strongest (#1) among all U.S. Credit Unions of \$1 Billion or greater, by Bancology, an independent Think Tank in the financial industry. So, we care a great deal about our brand... Allegiance's Member solutions are vital, easy-to-use links to and from our members. These solutions let us know how we are doing in keeping our brand shining—or not. I can't say enough about how critical the Allegiance products and reports are to us in managing our brand strength."

Brent Lawrence, Sr. Vice President, Mountain America Federal Credit Union



Allegiance offers the only comprehensive, multi-channel feedback management platform to hear the voice of your members and employees, and grow their loyalty and engagement.

Allegiance offers an enterprise feedback management (EFM) solution called the Engage platform that lets you hear and rapidly respond to the voice of your members and employees in real-time 24/7/365. This solution, which allows you to continually collect and view your member and employee feedback, puts you in touch with the voice of your members and employees via:

- Web links
- Online comment portals
- Email surveys
- Telephone hotlines

Rapidly respond to member concerns

The Allegiance system also automatically categorizes and routes this feedback to the appropriate person at your organization. Just by clicking a link, members can share comments about their experiences or expectations, even anonymously if they would like—and you'll be able to review and act on that feedback in real-time.

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Grow your member satisfaction, loyalty and engagement

Allegiance helps you achieve a high level of member satisfaction, loyalty and engagement by providing:

- “Pulse checks” of member impressions at any given moment
- Surveys that proactively request member input
- Ph.D.-led consulting that designs your plan and helps you maximize impact

Plus, our solutions allow you to measure and monitor member and employee satisfaction, loyalty and engagement on an ongoing basis, as well as learn about factors that drive purchases and product/service cancellations. By using this solution, you'll not only be able to retain more members, but you'll be able to gain the valuable insights needed to improve your member services and grow your business.

How the Allegiance Engage solution works

The Allegiance Engage platform includes a range of Enterprise Feedback Management (EFM) tools that will help you engage your members—as well as your employees and partners if you choose. More than just collecting feedback, Allegiance integrates simple interfaces with powerful analytics and expert Professional Services to help guide you to better performance and greater profitability.

1. Gather quality member feedback quickly

Member feedback may include surveys, questionnaires, and unprompted comments. Allegiance collects them all into a centralized system that automatically “sorts” feedback into categories—and even accelerates pressing issues to upper management right away. There's no digging through stacks of comment cards or waiting for survey results. Allegiance takes in the data, lets you see it instantly, and unlike one-shot surveys, you can keep your eye on how things are going all the time. Allegiance also allows you to link our platform to your Customer Relationship Management (CRM), Enterprise Resource Planning (ERP) or other database systems to gain a holistic view of your members.

2. Analyze data for meaningful insights

Getting feedback from members is one thing, but interpreting it can be quite another. The powerful Allegiance dashboard and reporting capabilities show where you're doing well and areas that are underperforming. Our Professional Services team can help you identify items that are causing member and/or employee satisfaction or dissatisfaction at this moment, plus track trends over time. You'll be able to see the member loyalty drivers that are unique to your organization and align “soft” feedback data with hard numbers such as member churn, sales growth, cash flow, and more. This allows you to quantify your organization's performance and demonstrate the effect of actions or changes.

3. Put the results to work improving your credit union

Not every organization knows what to do with the information they've gleaned. Only Allegiance incorporates a system of predictive analytics that acts as your organization's crystal ball. Using your history of member feedback and your organization's performance, our engagement experts can show where you can achieve the best ROI for your time, energy and money. We'll recommend a plan of action based on your organization's drivers and proven efforts that we have seen work.

A big idea that's part of a bigger solution

Member-oriented solutions are just part of the overall Allegiance platform. We also apply our technologies and service expertise to employee engagement and survey solutions. Ask about solutions that will complement your Member efforts—and see how the full Allegiance Engage platform can affordably bring you the benefits of all.

THE ALLEGIANCE FAMILY OF SOLUTIONS



The Allegiance Engage platform delivers convenient, cost-effective Software as a Service (SaaS) solutions. They require no hardware or IT support.

For more information, visit www.allegiance.com.
To demo a product or contact Allegiance Sales,
call 801.617.8000.

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