



CASE STUDY

Tucson Federal Credit Union Turns Up the Heat with Total Expert



About Tucson Federal Credit Union

Tucson Federal Credit Union (TFCU) has been a pillar of the Tucson community since 1937. Originally established as a credit union for teachers operating out of the basement of Tucson High School, TFCU expanded in the 1980s to serve greater Pima County. Today, TFCU serves members through a network of six locations.

They are committed to expanding outreach and enhancing financial accessibility. To this end, TFCU plans to open two new branches by the end of the year, with an additional four locations planned by 2027.

Some of the new branches will prioritize serving underserved communities. Guided by its mission to support members and the community, TFCU continually looks for tools to better serve its member-owners.

That's where Total Expert comes in.

The Challenge

For TFCU's marketing supervisor, Cole Condie, the transition to Total Expert has been a game-changer. With their previous email software platform, Cole and his team encountered operational inefficiencies characterized by cumbersome workflows, limited automation capabilities, and suboptimal customer support.

Having to spend so much of their time and resources managing their CRM was preventing TFCU from effectively engaging with their members. "That system was just difficult to navigate," Cole explained. "Plus, we had to manually upload new member data daily, and their support process was inconsistent and slow."



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Cole Condie
Marketing Supervisor, TFCU

The Solution

Since implementing Total Expert, TFCU has seen their productivity and member engagement skyrocket. “Automation has been a huge win for us. I no longer need to manually upload data, and email campaigns that once took weeks to build can now be done in minutes with Journeys,” Cole said.

Total Expert’s drag-and-drop functionality and prebuilt Journey templates have streamlined TFCU’s email marketing, saving valuable time and resources. “It’s incredibly user-friendly. My colleague Kevin, who’s new to marketing, mastered it within a week,” Cole shared.

TFCU has also seen a boost in their overall email performance. Their open rates now consistently exceed the financial industry’s 25-26% benchmark and click-through rates have improved thanks to the platform’s visually engaging templates. Cole noted, “The emails we create with Total Expert look more professional and polished. And the ability to pull member data into Journeys allows us to personalize each message around their needs, so they don’t feel like just another transaction.”

Beyond the tools, TFCU is thrilled with the dedicated support from Total Expert’s team. “The implementation process was seamless. Their team went above and beyond to ensure our success,” Cole said. “Even now that we’re up and running, they’re always still available to answer questions and offer solutions.”

For TFCU, Total Expert aligns perfectly with their member-centric philosophy. By improving efficiency and enhancing their marketing efforts, the platform enables TFCU to better serve its members and focus on its mission of community support. “Total Expert has been truly transformative,” Cole concluded. “It’s not just a tool—their entire company is a partner in helping us grow and connect with our members.”





About Total Expert

Total Expert is the purpose-built customer engagement platform trusted by more than 200 financial enterprises. Total Expert unifies data, marketing, sales, and compliance solutions to deliver the perfect customer journey across every financial milestone—in any market. Total Expert turns customer insights into actions that increase loyalty and drive growth for modern banks, lenders, credit unions, and insurance companies. Total Expert is now available for purchase on the AWS Marketplace and Salesforce AppExchange.