



## CASE STUDY

# Canvas Credit Union Automates and Personalizes Member Communications with Total Expert



Canvas Credit Union (formerly Public Service Credit Union) has provided residents across Colorado with personal and business banking services for more than 80 years. Today, Canvas has 44 locations across Colorado and maintains licenses in 43 other states as well.



## At a Glance

### The Situation

Neither loan officers nor marketers could send customized, automated information to individual members and non-members

### The Solution

Unified data, pre-built integrations and automated CRM capabilities enable Canvas to deliver relevant, personalized communications.

### The Success

- More productive, more effective loan officers
- Greater operational efficiency
- Higher member retention
- A fulfilled brand promise



## The Situation

In 2018, Public Service Credit Union changed its name to Canvas Credit Union and launched a new brand identity intended to position its customized approach as the best way both members and non-members can better “afford life.”

But right away, credit union leaders feared they’d break their new brand promise by bombarding members/non-members with information about products and services they simply don’t need. That’s because employees still used Excel spreadsheets and Post-it notes to try to track important information about their contacts, and it wasn’t possible for them to send personalized messages that matched the current interest of each recipient.

Leaders knew they needed to find an automated, SaaS-based CRM platform that would empower its loan officers to provide efficient and, most importantly, relevant member service.

**“I’ve used several marketing automation platforms over the years, and Total Expert is my favorite by far. It’s easy, it’s complete, it’s automated and it’s more robust than you even think is possible. Trust me — Total Expert will solve all your CRM and marketing problems. I honestly don’t know how I’d work without it.”**

Todd Barrett

Sr. Mortgage Loan Originator, Canvas Credit Union

## The Solution

Andy Watson, SVP of Mortgage and Sr. Mortgage Loan Originator Todd Barrett were confident Total Expert could help Canvas uphold its new brand promise — and much more — because they’d both used the customer engagement and intelligent automation platform with great success at a previous employer.

Now, Total Expert unifies, organizes, and tracks all member, prospect, and real estate agent data on one platform and gives each loan officer a blueprint for how to work most effectively each day.

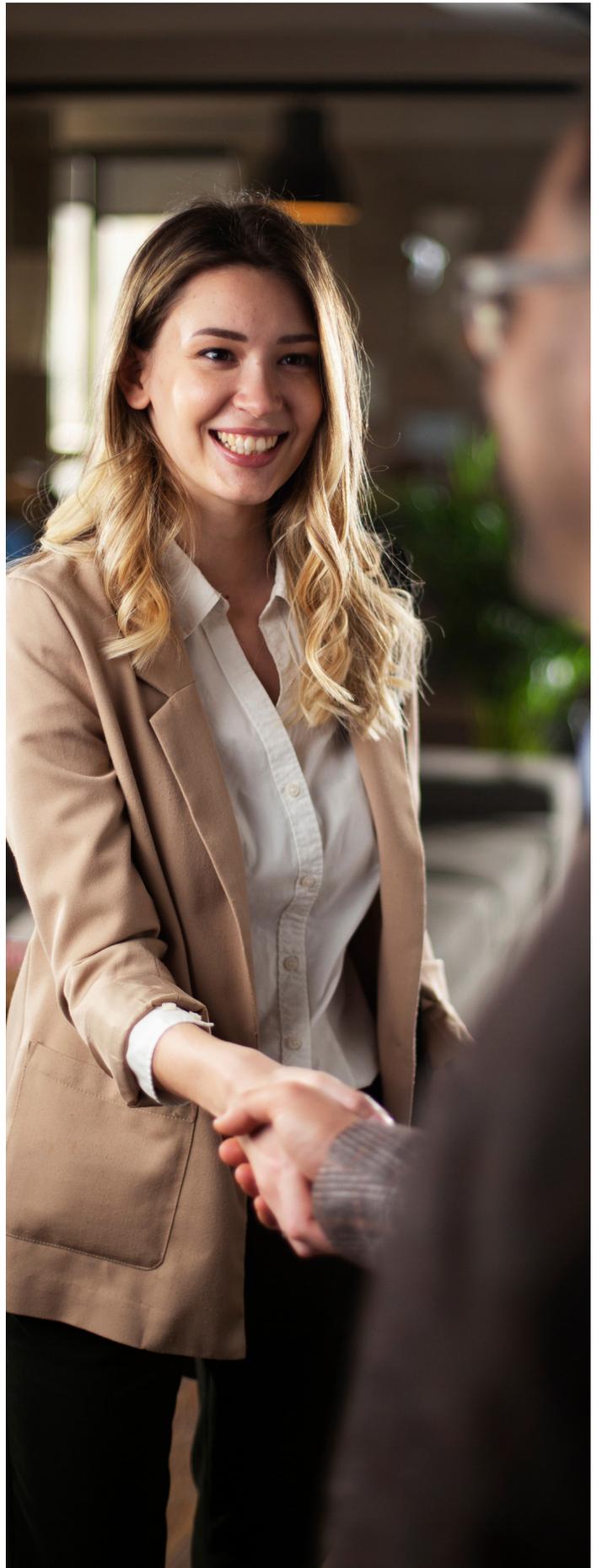
Pre-built integrations with popular tools like Microsoft Outlook, BombBomb, Mortgage Coach, LinkedIn, and Facebook eliminate any custom coding that used to bog down the Canvas team. An intuitive interface and online content library makes it simple for anyone in sales and marketing to create co-branded marketing materials and custom, automated Journeys that update members with the information most relevant to them. And modern sharing options enable users to quickly promote Canvas messages across a wide variety of social media platforms.



## The Success

Users attribute Total Expert with re-igniting and increasing the productivity of its loan officers, improving member retention, and driving operational efficiencies across the board.

That's because loan officers and their assistants no longer spend the bulk of their time manually communicating with members. Marketing efforts are more streamlined and more easily comply with industry mandates. And everyone involved in a loan is automatically kept up to date on its progress.





## 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.