



CASE STUDY

Lake Michigan Credit Union Strengthens Member Engagement and Increases Marketing Visibility



Decades of steady growth, strategic mergers, and the addition of several major service lines have transformed Lake Michigan Credit Union (LMCU) into a \$12.8 billion financial giant—the largest financial institution headquartered in West Michigan.



At a Glance

The Situation

Neither loan officers nor marketers could effectively stay in touch with and keep credit union members informed about all the LMCU products and services available to enrich their financial lives.

The Solution

Customer Intelligence, automated Journeys, and a built-in digital content library help LMCU deliver perfect member journeys.

The Success

- Empowered, more effective loan officers
- Customized messaging about the most-relevant products
- Fast creation and delivery of personalized sales and marketing materials

The Situation

Lake Michigan Credit Union (LMCU), a financial institution that prides itself on its quality products and competitive pricing, faced a challenge in early 2023. Despite offering a range of products and services, LMCU's leaders were unsure if their members were aware of all the options available to them.

That's because keeping members educated on all of LMCU's various products and services was easier said than done. But leaders knew the right technology could help. So they decided to find a better, more effective, technologically-driven way to stay in touch with members who have existing mortgages with LMCU, continue to engage with people who attend LMCU marketing seminars, and empower their loan officers to better leverage LMCU marketing materials.



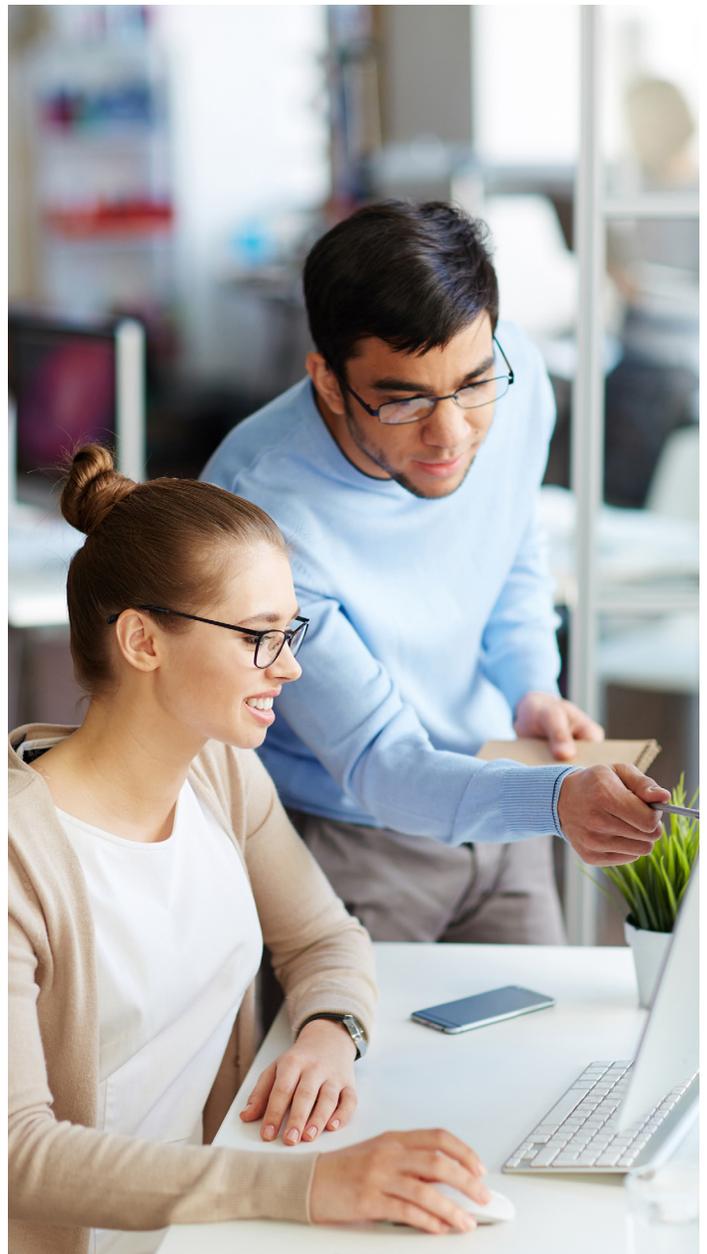
“We are thrilled to have now implemented Total Expert at LMCU. This will help to ensure we retain our members for life as we continually add new members to our mortgage servicing portfolio.”

Eric Burgoon
Sr. Vice President of Mortgage Lending

The Solution

LMCU selected Total Expert’s purpose-built engagement platform to provide their members with a comprehensive and personalized experience.

Now, more than 568,000 LMCU members receive personalized, relevant, Total-Expert powered communications. Total Expert Journeys, for instance, effortlessly guide members and nurture leads through automated messaging and sequencing most appropriate for them. Total Expert Customer Intelligence monitors member behavior and intent data—like when a member lists their home on the market or reaches a specific equity threshold—to help LMCU identify additional opportunities to increase wallet share. And Total Expert’s built-in digital content library makes prebuilt, marketing-approved materials available for loan officers to quickly customize and share according to each member’s individual financial goals.





The Success

Total Expert has proven to be a valuable asset for LMCU, helping them retain more members with personalized communication and attract new ones with targeted products and educational offerings at the precise moment they need them.

With the ability to deliver perfect member journeys every time, LMCU loan officers are empowered to be trusted partners and advisors for their members. LMCU has seen remarkable results, with over \$30M in funded loan volume in just the first four months of leveraging Total Expert Customer Intelligence. Total Expert is helping LMCU achieve its goals and continue to provide exceptional service to its members.



About Total Expert

Total Expert is the purpose-built customer engagement platform trusted by more than 200 financial enterprises. The platform 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 to increase loyalty and drive growth for banks, lenders, credit unions, and insurance companies, and is now available to purchase through the AWS Marketplace and Salesforce AppExchange.