

INDUSTRY | FINANCIAL SERVICES (BANKS & CREDIT UNIONS)



Tinker Federal Credit Union (TFCU) sought to modernize how it engaged and served members in a rapidly evolving financial landscape. They wanted to transform how data, technology, and people connected across the organization.

### Challenge

The credit union's leadership wanted to deliver more personalized, frictionless member experiences. They wanted access to insights that could deepen relationships and grow deposits and loan volume. However, fragmented systems and siloed data made it difficult to gain a single, unified view of each member's relationship and history.

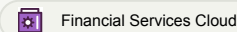
- **Member 360 Visibility:** Needed a comprehensive, cross-departmental view of each member's data, accounts, engagement, and relationships.
- **Process Efficiency:** Sought to streamline operations between front-line and back-office teams through CRM automation and integrations with core systems.
- **Share of Wallet Growth:** Wanted to empower staff with AI-driven insights and next-best-product recommendations to expand member relationships.
- **Data-Driven Strategy:** Aimed to make data accessible and actionable across the organization to drive faster, more informed decision-making.

### Solution

TELUS Digital partnered with TFCU to configure Salesforce Financial Services Cloud. The implementation focused on integrating Salesforce with Symitar and other back-end systems, giving employees a consolidated, real-time view of member information and enabling greater operational agility.

- **Unified Member View:** Configured Financial Services Cloud to consolidate member data, account details, transactions, and engagement history into a single, intuitive interface.
- **Core Integration & Service Automations:** Leveraged Mulesoft to get direct access to account and card data, automated routine workflows, and digitized service requests to minimize manual effort.
- **Referral & Opportunity Tracking:** Leveraged Salesforce Referral Management to improve assignment, tracking, and conversion of leads and referrals—supporting data-driven growth initiatives.

### PRODUCTS USED



### KEY OUTCOMES

- **Centralized Member Hub:** Delivered a single source of truth with real-time member data, financial profiles, offers, alerts, and transactional insights.
- **Operational Efficiency:** Reduced manual workload by automating workflows and enabling direct access to key systems to accelerate issue resolution.
- **Data-Driven Performance:** Enhanced the ability to monitor SLAs, assess service quality, and measure employee performance through unified data visibility.

