



## Case Study

# A Synapsys® Success Story – United Heritage Credit Union

If anyone can speak with authority about the power of Synapsys Member Relationship Management™ software, it's United Heritage Credit Union. Every frontline employee uses it.

### COMPREHENSIVE DATA GATHERING

According to Sebrina Crawford, Senior Vice President of Operations, there are 116 FTEs entering data into the system. That data includes all referrals, onboarding information, direct mail responses, and cold calls. As just one example, each new member and prospect gets the "How did you hear about us?" question and the answer goes into Synapsys.

United Heritage uses the software to keep close tabs on the outcome of each public relations campaign, advertisement, or promotion. The resulting intelligence guides and focuses future campaigns. An added bonus is the software's integration with Episys®. From within Episys, for example, a teller can simply right-click on a member name within Teller Transaction and select "add referral" to add data to Synapsys.

The credit union has seen a significant growth in qualified applicants and members in the recent past, and credits Synapsys as playing an important supporting role.

### SUCCESS – IT STARTS WITH A PLAN

"Synapsys is there to support an existing system," says Crawford. "You must develop a solid sales and business plan to make use of it." If a credit union calls to ask for a referral regarding Synapsys, Crawford is quick to point out that simply buying the software will not get results. "You need to know why you are buying it and what KPIs (key performance indicators) to expect in the first year."

If there is not an onboarding system in place, for example, that system might be developed either before or in tandem with the introduction of your Synapsys support. "CRM (customer relationship management) is new to some credit unions," says Crawford. "They need to know that it won't create a good sales process or fix a current one. There needs to be a mature sales team that is motivated to use CRM to its full advantage."

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[www.uhcu.org](http://www.uhcu.org)

**Assets**  
\$804 million

**Branches**  
12

**Members**  
55,825

**Founded**  
1957

**Symitar Software  
Solutions & Services**  
Episys  
Synapsys

### EARNING THE RESULTS

When you have that strong sales presence and know what data you want to track, that's a good time to bring Synapsys into action. The first thing a credit union will want to do is customize the software to match its goals and processes. "You need to dedicate some planning time to get the results you want," says Crawford. "It's like a marriage – if you're not committed and contributing it's not successful." She recommends putting considerable thought into the implementation process. This has the benefit of making a credit union think through its current processes, and also makes for a better outcome.

In the case of United Heritage, the outcome has been extraordinary. Since beginning to use Synapsys in 2007, the rate of quality referrals has consistently increased year after year. The frontline staff, at United Heritage, has utilized Synapsys to submit several thousand referrals annually resulting in an increase in production and growth. The ratio of referrals to qualified products and services opened has increased over 159 percent since the conception of Synapsys. Synapsys continues to assist United Heritage in producing over a 70 percent conversion rate of products referred to qualified referrals.

### INCENTIVES

Synapsys gives staff members a clear look at their own progress. The "My Sales View" feature in Synapsys provides a collection of reports that enables employees to track their advancement toward goals. United Heritage incentive plans for employees and the software shows them their sales statistics on a daily basis.

For staff, the improved ability to record and use referrals and customer data ties neatly into this view of their own progress. It's a self-reinforcing system that creates a spiral of better performance.

### STRATEGY

For management, Synapsys is part of its strategy planning. "When we look at our business plan, we consider how we'll use Synapsys to support it," says Crawford. At United Heritage the goal is continuous improvement of operational and sales strategies. It leverages the depth of Synapsys functionality to attract, develop, and retain profitable member relationships.