

BUSINESS PROFILE

Credit Union National Association (CUNA) is the premier national trade association serving America's credit unions. The not-for-profit trade group is governed by volunteer directors who are elected by their credit union peers. In partnership with state credit union leagues, CUNA provides many services to credit unions, including representation, information, public relations, continuing professional education, and business development.

Industry

Trade Association

Location

Headquarters: Washington, DC
Operations: Madison, WI

Staff Size

300 employees
7,000 credit unions
270,000 active individual customers

Deployment Summary

Enhance the Credit Union National Association's Web site experience with the Personify™ e-Business Suite, customized specifically for credit unions' needs.

Technology

Personify™ e-Business Suite

Benefits

- Built to fit association and member needs.
- Enables users to manage their own data.
- Fully integrated component of the broader association management software platform.
- Enhances efficiency with end-to-end automation of online orders/requests.

Customer's Implementation Advice

- Ask good questions and be informed about the products' abilities and implementation procedures in relation to your goals.
- Start testing internally as soon as possible. Users provide better feedback when they are actually using the product.
- Keep on top of integration capabilities between the Personify platform and the e-Business Suite. When requesting a change in one environment or the other, be sure to incorporate any corresponding changes to the other side.

CASE STUDY:

Credit Union National Association (CUNA)

"We are constantly striving to provide our member credit unions with the most advanced resources to build and maintain their businesses. With the Personify™ e-Business Suite, we are able to leverage more specific visitor data, remove redundancy, and increase event participation. Most importantly, this allows our credit unions to manage their own data."

Timothy J. York
Senior Project Manager
Credit Union National Association Inc.

CREDIT UNION PROFESSIONAL SOCIETY PROVIDES CUSTOMIZED SERVICE WITH PERSONIFY™ E-BUSINESS SUITE

Web self-service suite offers consistent member experience

The Credit Union National Association (CUNA) works tirelessly with paid and volunteer staff to support and build the credit union movement in the United States. One of the association's goals is to "develop and maintain an efficient and effective infrastructure that encompasses human, financial and technological resources." The main components in this infrastructure are CUNA's association management software (AMS) and its Web site - www.cuna.org. Keeping these running at peak efficiency is critical to the organization's mission.

With that in mind, CUNA decided to upgrade its existing AMS software to TMA Resources' Personify™ system. As they began this process, they also turned to TMA Resources for a solution to upgrade their Web site functionality. At the time, CUNA's Web site offered online meeting registrations and product purchases, but it was still manual and cumbersome on the backend. Many online orders had to be processed and completed manually, resulting in delays, data redundancy and sometimes inaccuracies.

The TMA Resources' Personify e-Business Suite, which is an integral part of the Personify AMS, offered the additional e-commerce and data maintenance applications CUNA was looking for.

“Essentially we needed the same functionality we had before with previous TMA Resources products, but with added efficiency,” said Kevin Knope, director, Web services, CUNA. “The Personify e-Business Suite was a good solution because it allowed us to directly, and in real-time, integrate our Web and Personify data.”

CUNA went live with the Personify e-Business suite in December 2008. The suite launched with customer profile, meeting registration, username and password storage, membership renewal and data maintenance functionalities.

“Our main goal for the e-Business Suite at launch was for it to put power in the hands of our member credit unions,” said Timothy York, senior project manager, CUNA. “We believe that our members’ information is their own, not ours, so they should have the control to manage it. From paying bills to updating profiles to signing up for meetings, members should receive a custom experience on our Web site.”

Along with the standard e-Business Suite functions, CUNA also needed to be able to modify some features. The association provides services in an intricate network of credit unions comprising many standards for information handling and transactions. Out-of-box modules often do not fit CUNA member requirements. The Personify e-Business Suite allowed them to mold features to the industry’s strict requirements.

Among the modified modules CUNA introduced were variations on site log-in; account activation pages built according to specific member criteria, including complex pricing structures; meeting registration to capture emergency contact info; special pricing based on membership criteria; and billing based on ACH processing.

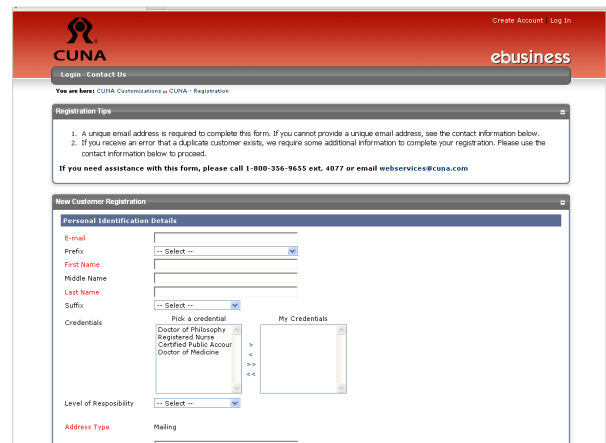
The system has even helped CUNA realize benefits they didn’t expect, such as the ability to quickly set up conference registration for hot-topic issues that require quick turnaround on member sign-up. “With the e-Business Suite, we were able to process 3,000 registrations in 72 hours for a recent audio conference. In the past, this could have taken two weeks,” said Knope. The suite also allowed him to provide the presenters with detailed demographic information on the attendees.

As with any new software deployment, CUNA did run into some hurdles, specifically with varied customer behavior and helping members adjust to new login requirements. However, Knope and York agree that the standard work flow of the Personify e-Business Suite is so straightforward and easy to use that both staff and members adapted quickly.

In the future, CUNA is looking forward to further updates to their infrastructure. Soon, they will begin moving all inventory through the Personify e-Business suite’s e-commerce application.

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Kevin Knope
Director, Web Services
Credit Union National Association



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TMA Resources Inc.: Headquartered in Vienna, Va., TMA Resources and its team of highly skilled professionals produce member relationship software solutions. Clients include many of the most prestigious professional societies, trade associations, labor unions, and other member-centric organizations in the United States and overseas. TMA Resources was named No. 326 on the 2008 Software 500 listing and is listed as one of the largest technology employers in the Washington, D.C. metropolitan area by the Washington Business Journal. For more information about the company, visit www.tmaresources.com.