

CRM for Credit Unions

Top 6 Ways Sugar Provides Credit Union Functionality

SugarCRM enables businesses to create customers for life with the world's first intelligent, no touch customer experience (CX) platform.



Features



Householding

Household relationships among members allow you to understand and explore relationships that exist between your members. This results in a significant opportunity for up-sell, cross-sell and improving member relationships. The householding process in Sugar will show relevant relationships between member records; such as the same home telephone number or the same home address, a workflow or business rule will then link the records for future reference.



Product Cross-Selling

Your credit union members may have the same or a similar product, but it might be very different in profitability: Some of your members have more in their checking accounts than others. Some pay more fees for overdrafts or late charges on loan payments. Some use the credit cards you offer while others do not. With Product Cross-Selling in Sugar, you can present new products that are available based on the product profile of a member in real time.



Referrals

Allow users within the bank to issue and track referrals between business units. A branch operator may identify that a member is looking for a specific loan product, and with one click the operator can route the member to the appropriate team. Distinct Dashboards and Alerts will notify the assigned business unit of the referral. All referrals are tracked to ensure sure that the assigned Business Unit has received the referral. We have found that this will increase communication between departments by over 20%. More Referrals = More Money.



Core Platform Integration

Integrate Sugar at the core of all your Credit Union applications including:

- Deposit and transaction information
- Loan Approval and Application Status
- Marketing Automation
- Data Warehouse
- Business Analytics

By having Sugar as your central hub, transform your bank into a member-focused, service minded and value adding machine.



360-Degree View of Your Members

Sell proactively and avoid surprises by knowing what matters to your members, when it matters. Know your members inside and out with 360-degree activity history across the extended member community. Quickly understand what matters to your key contacts and when to engage with smarter account intelligence based on cross-channel and social media activity.



Marketing

With a curated toolset that includes highly intuitive campaign builders, advanced automation and superior reporting, Sugar Market focuses on what matters most to marketers – streamlining campaign creation, understanding engagement, improving conversions and driving more revenue.