DELIGHT DEEPDIVE

Automating **Voice of Member** surveys for Arizona's largest credit union

DESERT FEDERAL CREDIT UNION

CC
CLOUDCHERRY

desert
FINANCIAL
CREDIT UNION

ABOUT DESERT FEDERAL CREDIT UNION

Founded in 1939 and headquartered in Phoenix, Desert Federal Credit Union is a not-for-profit credit union with over 300,000 members. All Desert Federal Credit Union members are owners, with voting rights. Desert Federal Credit Union is the largest credit union in Arizona, operating through a network of 45 branches and managing over $3.7 billion in assets. Desert Federal Credit Union helps members achieve their financial goals, while sharing profits back with members.
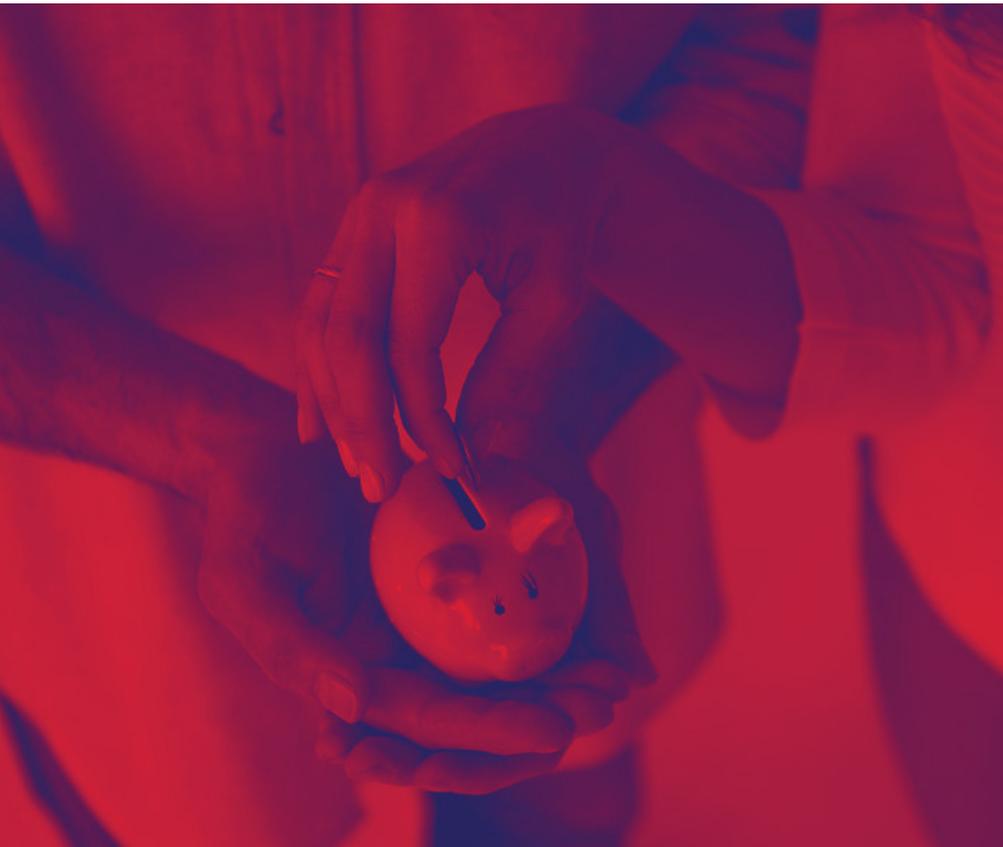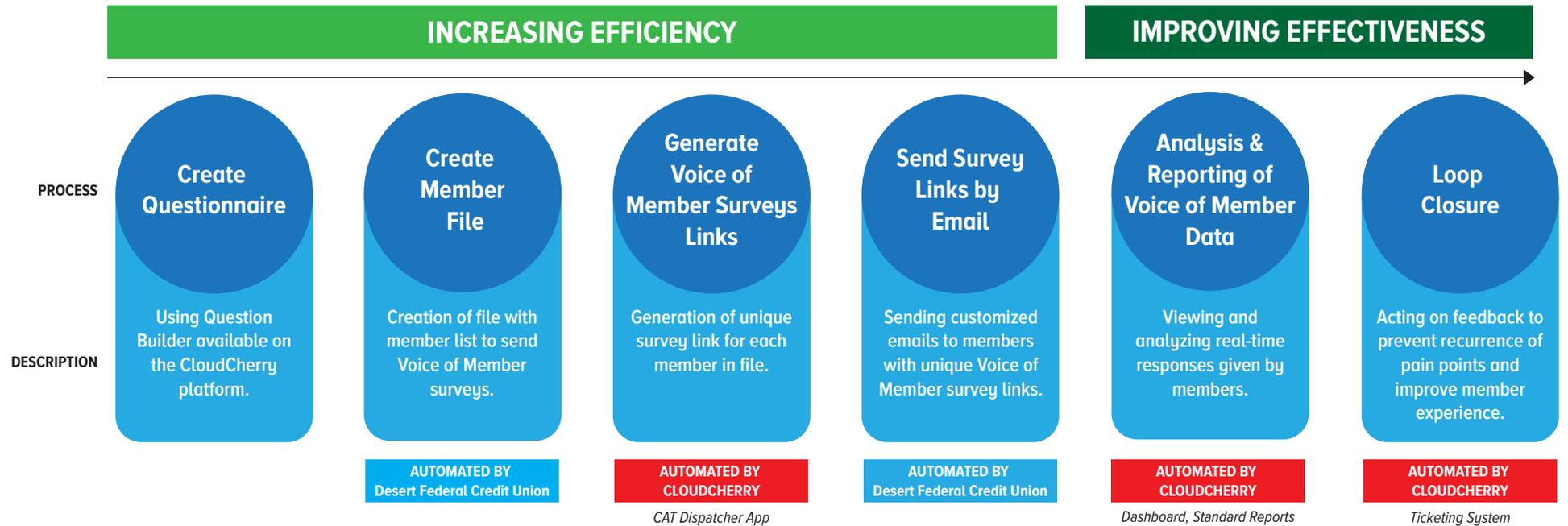
CHALLENGES

◆ Relatively difficult to create feedback questionnaires

◆ Data analysis and reporting were done manually, using up precious time and resources

◆ Data from different Voice of Member & Voice of Employee (VoE) surveys were not centralized in one location in a visually appealing format

◆ Effective loop closure was not part of the process

◆ Management teams did not receive real-time insights based on feedback

On the back of these challenges, Desert Federal Credit Union was in search of a new software platform not only to manage its Voice of Member surveys but also to run and derive insights from its Voice of Employee surveys.

SOLUTION

The Voice of Member solution deployed by Desert Federal Credit Union, with assistance from CloudCherry had two major objectives.

INCREASING EFFICIENCY				IMPROVING EFFECTIVENESS	

PROCESS

Create Questionnaire	Create Member File	Generate Voice of Member Surveys Links	Send Survey Links by Email	Analysis & Reporting of Voice of Member Data	Loop Closure

DESCRIPTION

Using Question Builder available on the CloudCherry platform.	Creation of file with member list to send Voice of Member surveys.	Generation of unique survey link for each member in file.	Sending customized emails to members with unique Voice of Member survey links.	Viewing and analyzing real-time responses given by members.	Acting on feedback to prevent recurrence of pain points and improve member experience.
	AUTOMATED BY Desert Federal Credit Union	**AUTOMATED BY CLOUDCHERRY**	**AUTOMATED BY** Desert Federal Credit Union	**AUTOMATED BY CLOUDCHERRY**	**AUTOMATED BY CLOUDCHERRY**
		CAT Dispatcher App		*Dashboard, Standard Reports*	*Ticketing System*

Increasing Efficiency

- Faster, more flexible development of standard and unique questionnaire requirements on the CloudCherry platform
- Automated emails for soliciting feedback
- Automatic generation of unique survey links for all surveys

Improving Effectiveness

- Real-time survey responses requiring action automatically directed to management teams
- System for recording and tracking loop closure
- Providing management teams with 24/7 access to member responses, data analysis, and reports

RESULTS

INCREASED EFFICIENCY

95% reduction in time taken to act on issues raised by members as employees no longer need to create and assign tickets manually

75% reduction in time taken by management teams to make notes. Earlier, notes were recorded with dates, names etc. on spreadsheets. With CloudCherry, notes can be created within the platform and they are automatically time-stamped

50% reduction in time spent by employees collating, analyzing and reporting data obtained from Voice of Member surveys

IMPROVED EFFECTIVENESS

6% increase in NPS® for relationship surveys from Q3 2016 to Q1 2017

2% increase in overall satisfaction for relationship surveys from Q3 2016 to Q1 2017

IMPACT OF CLOUDCHERRY'S SOLUTION

Desert Federal Credit Union now has a smooth, automated member and employee experience management process. The full process from generation of survey recipient lists to viewing and acting on results, does not require manual intervention, which saves time and effort.

The automation has allowed Desert Federal Credit Union to focus on what really matters; listening to and making improvements based on member feedback.

FUTURE PLAN

In 2017, Desert Federal Credit Union is likely to start using more channels available on the CloudCherry platform such as tablets & QR codes, in addition to emails. As a result, members will have more opportunities to give feedback while availing themselves of Desert Federal Credit Union' financial services using the channel they feel most comfortable with.

> The CloudCherry team is incredibly professional and hard working. They are willing to work with us to provide us with the exact tool we want. This product is highly customizable which is what we were looking for. The dashboard is incredible. No more manual manipulation of data for analysis.
>
> Melissa Crowe,
> Senior Director,
> Quality and Business Continuity

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For more information, contact:

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CloudCherry is a leading Voice of Member solution that empowers Credit Unions to run complete Voice of Member programs, map omni-channel member journeys and engage with their members across multiple physical and digital channels, deliver delightful experiences through real-time predictive insights, and integrate with leading systems of record to make Member Experience a key driver of loyalty and retention rates.