

SAFE Credit Union Receives a Positive Response to its Beacon Pilot

Discovering a new way to present highly relevant, targeted messages to members

Purpose

SAFE Credit Union is always interested in trying new technology that improves their members' experiences with SAFE products and services. Combining beacon technology with real-time surveys, SAFE wanted to learn if customers would be receptive to being asked by their financial institution to opt into location services on their mobile device. SAFE's short term goal was to see the opt-in rate for beacon services and how members interact with the new technology.

Approach

Of the many ways that beacon can be used, SAFE decided to start with member surveys. Today SAFE sends paper surveys to members. SAFE worked with Digital Insight to design a branch exit survey that could be delivered to members who are identified through the beacon technology. SAFE ran a branch exit survey where, upon leaving a branch, members would receive a survey request if they had opted in to receive location based alerts. The survey asked members to rate their service at the branch that day. Next, SAFE added an entry survey, which asked members what they were coming into the branch to do.

SAFE Credit Union

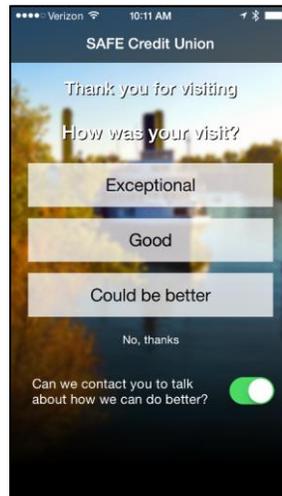
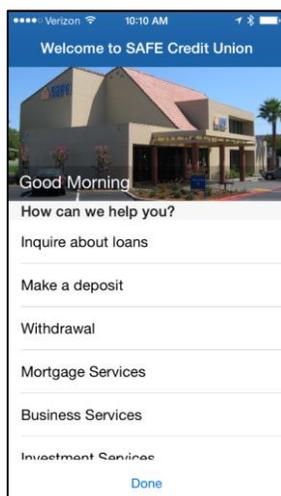
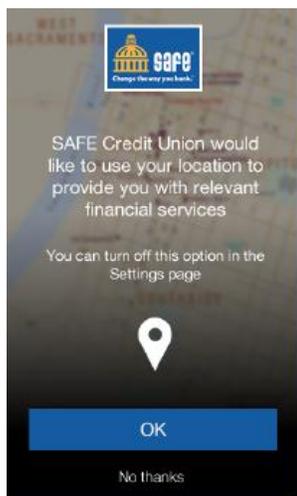
Headquarters: Sacramento, CA

Members: Over 180,000

Assets: Over \$2.1 B

"One of the things that was so great about the beacon pilot is that it gave us the ability to present messages to our members in a highly relevant and targeted way. Our members could give immediate feedback to our branch managers, which really empowers the branch managers to deliver exceptional service."

Tarah Palomino
Vice President,
Applications &
Ecommerce
SAFE Credit Union



Outcome

SAFE was delighted to receive a very positive response from members. Prior to launching the beacon notifications, SAFE interviewed a number of members to gauge the likelihood they would be receptive to beacon notifications. All of those interviewed were very open to the idea of receiving relevant messaging via their mobile device.

Once SAFE launched, they did not receive any customer complaints about being asked to opt in and they had a very positive response to the exit and entry surveys being offered. Over 14% of surveys were completed, which is even better than their 10-12% response rate with paper surveys. Many members even provided additional positive comments when they submitted their completed surveys.

The benefit of getting a real time response from members about their experience means that SAFE can take action right away to make the member experience even better and more personal. And, this pilot also had the unexpected benefit that it enabled branch management to feel more connected to and part of the digital channel.

Future Outlook

Given the positive response so far, SAFE is looking towards the future and considering other ways beacon technology can improve the sales experience and other in-branch services.

“I cannot think of a single project that provided such connection across different areas. The beacon pilot helped the branch management staff feel like they are part of the digital channel and the efforts to move members to digital. We were able to bring both channels together in a way that benefits the entire organization.”

Tarrah Palomino-Prim
Vice President,
Applications &
Ecommerce
SAFE Credit Union

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