



CLIENT SUCCESS STORY
UNITUS CREDIT UNION

Unitus Community Credit Union wanted a targeted approach to connecting with customers by aligning and leveraging client data. The Baker Hill comprehensive business analytics solution promised greater insight into branch, account, and product profitability.

THE CHALLENGE

Unitus Community Credit Union (Unitus) serves 86,000 members in Oregon and Washington. A 2014 Portland Business Journal Corporate Philanthropy Award winner, Unitus is dedicated to building, strengthening and enhancing the lives of their members and others in the communities they serve.

For 79 years, Unitus has put their members first, but as membership grew their marketing customer information file (MCIF) couldn't keep up.

"Our old database was clunky and unresponsive," explains Lori Fink, Marketing Manager. "We had a list of wants that we have not been able to get to for years. Our resources were limited and we needed a partner to help in terms of expertise and manpower."

THE SOLUTION: IMPLEMENTING BAKER HILL ANALYTICS

Unitus sought to address their lack of resources by implementing a customized application of Baker Hill data warehousing, business intelligence, and marketing analytics solutions.

THE RESULTS

Doubled Cross-Sell Metric

Unitus wanted to increase customer touchpoints and grow their cross-sell capability. While using Baker Hill, they have seen that critical metric double. "The most important result is that Baker Hill gives us the right touchpoints with our members," says Fink.

The Baker Hill Analytics solutions enable Unitus to communicate with members in meaningful ways while keeping internal data integrated and aligned. The reliability and accuracy of the solutions simplify management of marketing programs within the credit union.



"The Baker Hill solution is turnkey and awesome. We love how we can move our strategies and enhance them as time goes on."

Lori Fink | Marketing Manager | Unitus Community Credit Union



“Our outreach ensures that we are adding value to the membership,” related Fink. “I don’t have to even think about it. I have complete confidence in the Baker Hill solution.”

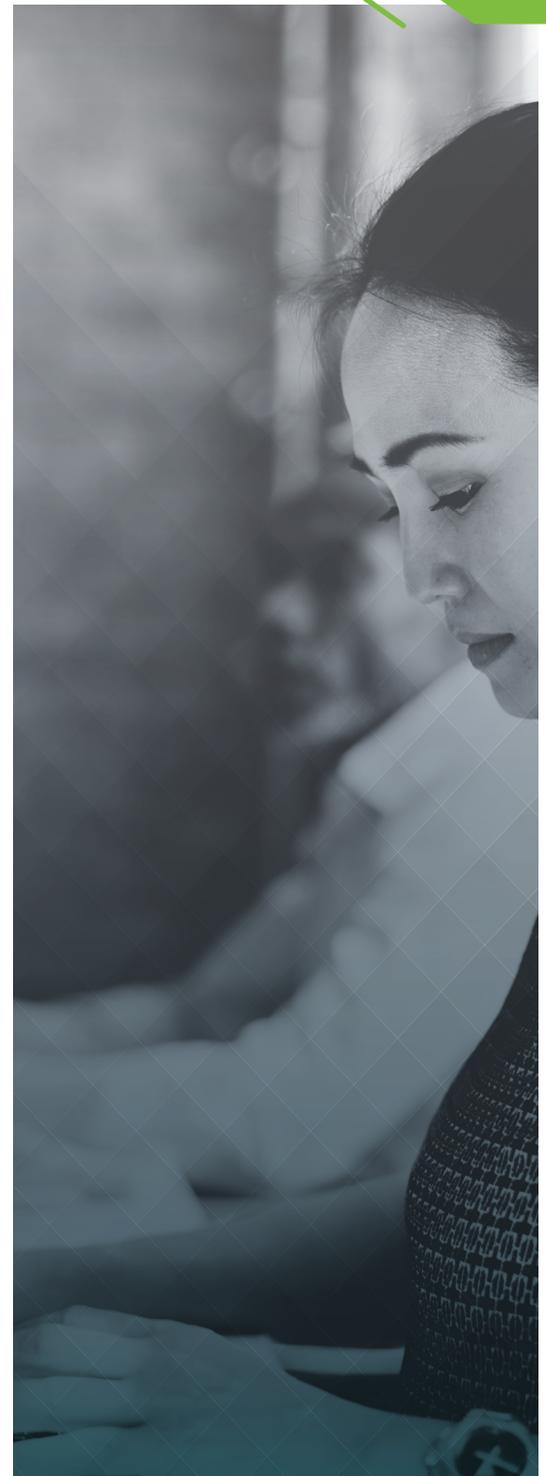
Profitability Insight

Recognizing the correlation between high usage and highly profitable members, Unitus gains bottom-line insight into profitability with Baker Hill Analytics, which deliver a 360° view of their credit union branches, accounts and products. Bringing customized business intelligence to bear helps to identify profitable products per customer. “Product profitability is the great insight,” reiterated Fink. “Being able to see how our products impact the bottom line is huge.”

Armed with a customized view of profit potential, Unitus launched campaigns targeted toward Generation X and Millennials. “These insights provide the means to anticipate and serve the needs of changing markets,” added Fink. “Our near and long-term strategy depends on Baker Hill.”

Predictable Next Best Product

The Baker Hill web-based profitability analytics solution relies solely on client data instead of industry averages. The information pulled from one comprehensive custom database has enabled Unitus to gain the insight needed to increase profitability while improving customer communication. “We have a lot of products,” stated Fink. “Baker Hill helps us know who we need to work with. The matrix program helps identify the right customers and the right touch approach for each client.” By leveraging the insight generated from the Baker Hill solution and offering products targeted for specific member needs, Unitus is charting a profitable course into the future. “The analysis and the insight has really helped us. We were able to see what we needed to change and what letters we needed to stick with. The solution is now able to give us a predictable next best product. We are going after customer needs rather than being more universal,” concluded Fink.



Baker Hill empowers progressive financial institutions to increase revenue, reduce risk, and drive more profitable relationships. As the #1 provider of member business lending services, Baker Hill serves 500 financial institutions, including more than 20% of the top 150 banks in the U.S.

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