Credit Union Embraces CRM, Drives Service, Innovation

Microsoft Dynamics Decision Case Study

“When we held an in-house event to showcase Microsoft Dynamics CRM, our users didn’t visit with one another or mingle around the refreshments. Instead, they lined up to try out the system. That’s how we knew our deployment would be a success.”

Headquartered in San Antonio, Texas, Security Service Federal Credit Union (SSFCU) has more than 900,000 members. The company deployed Microsoft Dynamics CRM to provide its member service staff across branches and call centers with a single view into member information. With the solution in place, the credit union aims to better serve its members, not only servicing them faster, thanks to service representatives being able to handle all requests in a single interface, but also by providing those employees with the insight needed to identify new products and services that align with member needs.

Goals

* Replace antiquated CRM system
* Provide single interface for member service staff
* Speed development and drive agility

Industry

* Financial Services

Country or Region

United States

Customer Size

1,600 employees

Number of Users

1,000 employees

Connect with SSFCU

**[](http://twitter.com/ssfcu) [](http://www.facebook.com/SSFCU)**

www.ssfcu.org

Todd Renaud, Vice President of Management Information Systems, Security Service Federal Credit Union

The retail banking space is fraught with competition. Customers often spread their savings and investments across many financial institutions, with no particular loyalty or preference for any one of their providers. This is a challenge with which Todd Renaud, Vice President of Management Information Systems for the Security Service Federal Credit Union (SSFCU), is familiar. “To be successful, we have to provide excellent service and be ahead of the curve in terms of identifying our member needs,” he says. “And we believe that having the right technology is the key to that.”

To that end, the company made the decision in the spring of 2012, to replace its legacy customer relationship management (CRM) system. “Our system had reached its end-of-life from a technical support perspective,” says Renaud. “If we didn’t make a change, we were putting our operation at risk; we were worried about not being able to deliver ongoing improvements to the business.”

## Choosing Microsoft Dynamics CRM

After a thorough due-diligence process, SSFCU chose Microsoft Dynamics CRM for its new system. Criteria for choosing the solution included:

* **Ease of support and development.** Microsoft Dynamics CRM enabled SSFCU to rely on IT skill sets that were readily available on the open market. The solution’s .NET development environment also made it easier to customize compared to other solutions.
* **Security.** Because SSFCU’s data-security strategy requires specific protocols for controlling sensitive member data, they elected to deploy an on-premise implementation of Microsoft Dynamics CRM rather than Microsoft Dynamics CRM Online.
* **Platform strategy.** Microsoft Dynamics CRM fit with SSFCU’s Microsoft-based technology environment, helping to simplify the IT landscape and further ease support.

## Deploying the Solution

SSFCU started its CRM deployment in April 2012, and went live with Microsoft Dynamics CRM just five months later. “The rollout went extremely well,” Renaud remarks.

Renaud indicates that the company benefited from rapid and successful adoption among its employees, with training time as much as 55% faster than with the company’s previous CRM system—but that’s not all. Most notable of the company’s initial success with Microsoft Dynamics was the service team’s reaction. “When we held an in-house event to showcase Microsoft Dynamics CRM, our users didn’t visit with one another or mingle around the refreshments,” Renaud recalls. “Instead, they lined up to try out the system. That’s how we knew our deployment would be a success.”

## Using Microsoft Dynamics CRM

Currently more than 1,000 employees across the SSFCU branches and call centers use Microsoft Dynamics CRM every day. With a powerful database of its own—but also drawing on information from other critical systems—Microsoft Dynamics CRM provides service staff with a universal view into member information. “With a single interface, we were able to cut 42% of the steps in our service requests, such as changing a member’s address,” says Renaud. “That translates into a much better member experience.”

In the future, Microsoft Dynamics CRM will also share information with the company’s website, enabling member self-service. But most importantly, Renaud points out that, “Microsoft Dynamics CRM will enable us to provide a more sales-oriented approach, allowing us to offer our members products and services that best fit them.”

# Next Steps

* [Connect with Microsoft Dynamics](http://www.microsoft.com/en-us/dynamics/contact-us.aspx)
* [Become a Dynamic Business](http://www.microsoft.com/en-us/dynamics/about.aspx)
* [Learn about Microsoft Dynamics CRM call center solutions](http://crm.dynamics.com/en-us/customer-service)
* [Learn about Microsoft dynamics CRM solutions for the financial services industry](http://crm.dynamics.com/en-us/financial-services)

This case study is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY.

Document published December 2012

For more information about Microsoft Dynamics, go to:

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)