

# doxim<sup>®</sup>



CASE STUDY

## Members Never Have to Repeat Themselves

Thanks to Conexus and Doxim CRM



## Executive Summary

### Customer

Conexus has over \$6 billion in assets under management and approximately 116,000 members across more than 50 locations throughout the province.

### Challenge

Because Conexus was built up from many smaller credit unions that had merged, it was difficult to share member information effectively throughout the organization, leading to a fragmented member experience and lost sales and service opportunities.

### Solution

Conexus implemented the Doxim CRM solution enterprise-wide, in conjunction with an intensive staff training program. Doxim CRM is a component application of the Doxim Customer Engagement Platform.

### Benefit

Now staff members are trained to have meaningful conversations with members and have a place to document and capture those conversations and next steps, improving the member experience across all departments.

## The Customer

Conexus Credit Union has over \$6 billion in assets under management and approximately 116,000 members. Over 900 employees and sales professionals serve these members across 50 locations.

## The Challenge

Like many credit unions, Conexus had grown over the years as multiple smaller credit unions merged and, because of this, their software solutions and processes were a patchwork of different approaches. As a result, members often had to explain things multiple times over to different departments or branch locations because too little information was centralized – a situation that was frustrating to members and staff alike.

Conexus wanted to ensure that members had a seamless, consistently excellent member service experience regardless of the channel or branch they accessed. Getting a large, geographically dispersed group of employees on the same page regarding member service was going to require the right technology and lots of hard work. Conexus needed employee buy-in, and they needed to get everyone trained and using a centralized CRM system properly.

## The Solution

Following the arrival of a new, technology-focused CEO, the Conexus team set out to implement an enterprise-wide CRM training program and roll-out the latest version of Doxim CRM across all branches. Doxim CRM had been installed at the credit union a number of years back, but Conexus had since entered a period of intense merger activity, leaving little time for new staff to learn to use the system, so there was no consistency in the way the CRM solution was being deployed. Still, organizational familiarity with the Doxim CRM system and a strong relationship with Doxim employees meant that Doxim CRM was the natural choice for Conexus to stick with and continue to use.

"We wanted a situation where the member tells the story once, and all our teams and channels wrap themselves around the member."

- Matt Welykholowa,  
Project Manager,  
Conexus Credit Union

"We were united in our deep desire to make a difference in the lives of our members and we embraced three strategic pillars to help guide us through our journey; consistent processes, leadership development and a solid sales & service strategy."

- Cary Ransome,  
Chief Operating Officer,  
Conexus Credit Union

**"We needed to have meaningful conversations with our members and a place to document and capture those conversations. We wanted Conexus to be fully integrated and perfectly seamless with tools, systems, and information about members."**

- Matt Welykholowa

Doxim presented their latest version of the CRM solution to the Conexus team, who were excited to learn about the many enhancements to the product since their initial purchase and install. After speaking with other satisfied Doxim clients, Conexus recognized it was time to upgrade the system and relaunch it. But first, they'd need to design a bottom-up approach to using it effectively across all branches.

### **Conexus Establishes A Baseline and Seeks Advice**

To begin the CRM re-launch, the Conexus team spoke with representatives from all of their branches and the back office as well. The goal was to evaluate how teams were using the old version of Doxim CRM and to learn where they were having successes, where it was not being used optimally, and what new features they might want to take advantage of.

Conexus extended this due diligence further by speaking with other credit unions that used Doxim CRM. First Ontario, Westminster and Interior Savings Credit Unions all offered Conexus advice on their successes and challenges. They all agreed that a key criteria for successful CRM implementation was to have solid, clear, defined staff processes in place.

### **Organization- Wide Working Group Defines The Solution; Erm Creates The Processes**

Following their discussions with other credit unions, the Conexus team was confident that Doxim CRM was the long-term answer to their need for a flexible solution. The next step was to focus on the ground-up approach to achieving buy in across the organization. They convened a working group with representatives ranging from tellers to branch managers, to members of the consumer retail, commercial lending and supervisory groups, plus team members from their wealth management arm as well. The working group planned out CRM processes which would help them offer a seamless member experience across all sales and service groups, so member interaction with Conexus would be effortless and friendly. Then the Enterprise Risk Management (ERM) group, who had observed these meetings, pulled together the actual procedures and processes based on the goals set out by the working group.

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### **HR, Learning and Development Rolls Out Training**

Using the processes and procedures developed by the CRM working group and documented by ERM, the Conexus HR Learning and Development team created several training tracks for CRM users. These included a modular, online, self-service training course, with modules of no more than 15 minutes duration. They also designed a Champion Training course. For this course they contacted the leadership of each location and requested they nominate a CRM Champion and resource and then trained these Champions in class to be positive change agents in their branches and offices. Finally, they created a training track for their leadership teams, which included education on how to coach employees on the use of Doxim CRM and training on how to leverage the Doxim CRM reporting functionality.

Doxim VP for Credit Unions, Rob Jones, says of this initiative, "I've never seen a client put this kind of effort into a roll-out. From cheat sheets to webinars, they trained everyone and they examined how the system would work for all parties, from senior execs down to front-line folks. It's no wonder they've been so successful."

### **An Immediate Positive Reaction – and Immediate Member Benefits**

Conexus's thorough preparation and inclusive

approach to the CRM roll-out paid off immediately. Leadership teams at branches and offices were delighted to have had input into how information was displayed in Doxim CRM and who would champion it at the local level. And front line staff members were engaged too. Previous efforts to implement new technology had taken more of a top-down approach, which had reduced buy-in. This was different.

Now Conexus has so many proficient Doxim CRM users that staff members are continually coming forward with feature and function requests to extend the value of Doxim CRM. In response to this, the CRM team is once again putting together a working group, and planning to embrace an upgrade a year. The new working group will discuss what features are planned for each yearly upgrade and the stakeholders from various business lines and support departments will prioritize next steps and select what features will be implemented first.

Most importantly, members are already benefiting from the re-launch of Doxim CRM at Conexus. For Member Applications Analyst Jared Kalenchuk, who helped head-up the project, one key metric is the NET Promoter Score, or NPS, derived from annual member surveys. NPS is a simple but effective measure of customer satisfaction. "We saw that when people went through the training, there was a massive uptick in NPS scores," he notes. Doxim CRM was helping empower staff to make an incredible difference in member service.

The referral process has also been streamlined and simplified through Doxim CRM, helping staff recommend products that will make a real difference in members' lives. Kalenchuk expects that the CRM-related metrics Conexus is gathering at present will continue to show increases in speed and efficiency and, most importantly, improvements in member satisfaction, loyalty, and increases in wallet share.

## What The Future Holds

At Conexus, a comprehensive process is already in place to ensure that the credit union doesn't lose momentum in their CRM adoption process. They continue to train new staff in the use of Doxim CRM and to refresh the training of current staff on an ongoing basis. They also intend to slowly integrate additional features, including using the automated campaign and workflow capabilities of Doxim CRM and further improving the links to their core banking system. One example of these improvements is their recent extension of the integration of the CRM system with their Ovation banking system, which allows Conexus staff to open an Ovation member file, while still within Doxim CRM. The goal is to minimize staff clicks and make their interactions with core systems more seamless and integrated. This will free them up to have more meaningful conversations with members and capture relevant details of these conversations instead of worrying about moving from one software platform to another.

With the successful roll-out of Doxim CRM, Conexus is positioned to assist members, employees, and the credit union community as a whole in achieving their goals. The team at Conexus has also committed to sharing their CRM implementation experience with other credit unions that are embarking on a similar journey. They attribute a good deal of their success to the knowledge shared with them during the early days of their CRM program. They would like to 'pay it forward' by inviting other credit unions interested in Doxim CRM to reach out to them with questions.

Doxim CRM is a component application of the Doxim Customer Engagement Platform.

**"For Conexus, the information shared with us saved so many headaches – we want to pay it forward. In that true credit union spirit, we want to help others."**

- Jared Kalenchuk, Member Applications Analyst,  
Conexus Credit Union

Interested in learning how Doxim CRM can help your organization?



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# doxim®

Doxim is a leading provider of SaaS-based customer communications and engagement software for banks, credit unions, and wealth management firms. Doxim's Customer Engagement Platform helps financial institutions transform their client experience, communicate effectively throughout the client lifecycle and improve cross-sell and upsell activities that drive increased wallet share. The platform addresses key digitization challenges, from automated account opening, through improved, personalized communications to anytime, anywhere content access, tailored to a client's channel preferences. This eliminates costly traditional paper-based, manual processes and enables cost-effective provision of an omni-channel experience that delights customers and improves their long-term loyalty. Find out more at [www.doxim.com](http://www.doxim.com).

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