



TRANSFORMING CUSTOMER EXPERIENCE

# SUCCESS STORY

*Prospera Credit Union Delights Members  
With User-Friendly Statements,  
Delivered Sooner*



# WISCONSIN CREDIT UNION REDUCES OPERATIONAL BURDEN OF STATEMENT CREATION, INCREASES PROCESS TRANSPARENCY

“Rollout of our new statements was seamless, and the Doxim team members were very responsive, even though we went live with the new statement solution over a holiday weekend. My team appreciates the easy-to-use website for marketing promotion upload. Our IT staff love the statement tracking functionality. And, most importantly, our members have expressed how much they like the new, easier to understand statements.”

- Kristina Flores, VP of Marketing

## The Customer

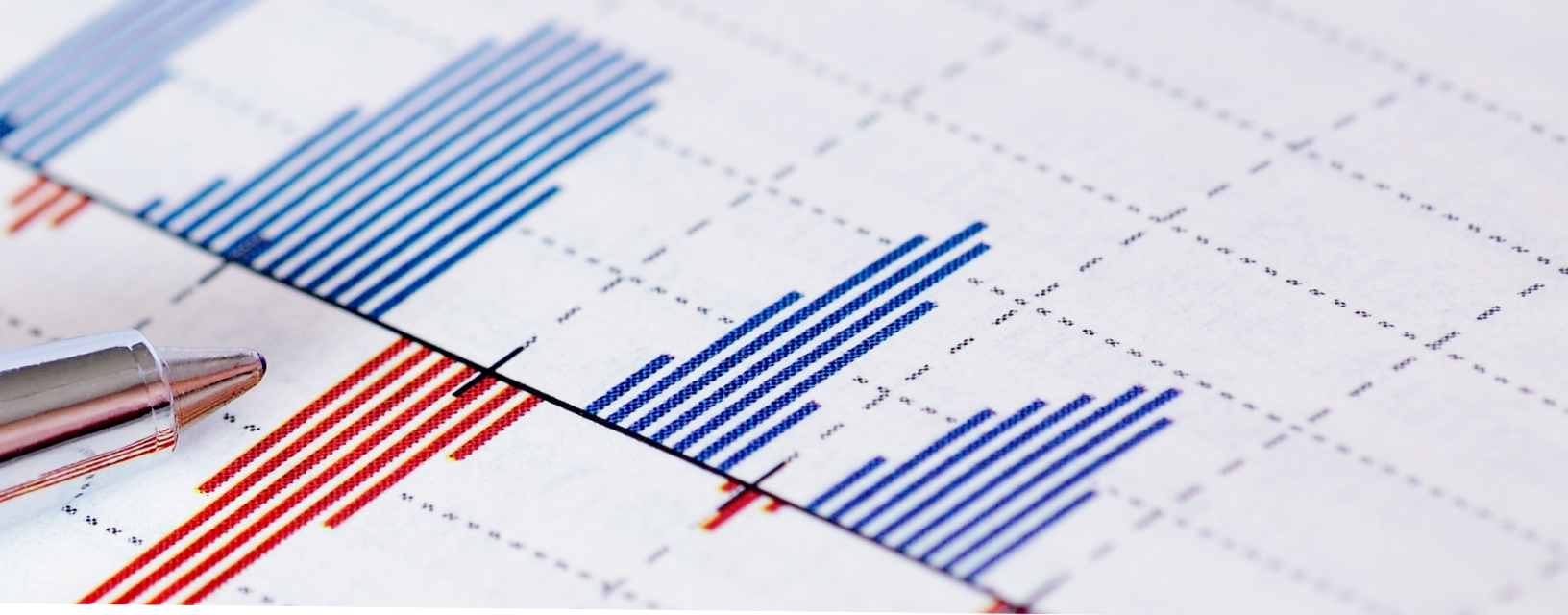
Prospera Credit Union first opened in 1934, under the Banta Credit Union name. Over the years, the number of people eligible to join was expanded to include nearby counties and communities. Today, Prospera Credit Union serves members in many Wisconsin counties, while maintaining the core mission the credit union was founded on: To provide personal, tailored guidance that leads to prosperity for all members.

## The Challenge

“Our statement service provider moved facilities, and that’s when the challenges started,” says Kristina Flores, VP of Marketing at Prospera. “We started to experience issues with late statements, or statements not arriving at all. Our members were calling us to indicate their concerns, and our internal team didn’t have visibility into the statement composition, printing, and mailing process, so they were limited in what they could tell the members about their statement status.”

The Prospera team, recognizing the importance of monthly statements to their member base, knew that they had to take action to ensure that their statements were reaching members in a timely and consistent fashion. They began the search for a new statement services provider.





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-- Lori Parker, IT Manager

### The Evaluation Process

"As a credit union, we have the advantage of being part of a network of peer credit unions, who share information," says Flores. "So we reached out to that network for recommendations, and began creating a comprehensive lists of required features and functions".

During this evaluation period, a new CFO, Michelle McClelland, began work at the credit union. McClelland had previous experience with the Doxim statement solution, and recommended the Prospera team consider it as well. Prospera's leaders were pleased with what they learned about the product, which met all the needs that they had documented during the scoping process. But equally importantly, they appreciated the Doxim commitment to client service, and the way the Doxim team worked to build lasting partnerships with their credit union clients.

### The Solution

Prospera Credit Union selected Doxim's high-quality print statements, which are designed with white space management and integrated marketing zones to lower expenses while also driving revenue. The credit union's leaders also make use of Doxim's all-in-one, mobile-responsive statement platform that allows them to to send images, request changes to an order, modify eNotifications, or just check the status of their statements.

"Rollout of the new statements was seamless, and the Doxim team members were very responsive, even though we went live with Doxim statements over a holiday weekend," indicates Flores. "Our account executive was in touch with us throughout the rollout process, and has checked in consistently since that time to make sure things are working as planned."



## Signs of Success

"Well, first of all, member complaints about statements ceased," says Flores. "That was the most important thing, because member service is always a top priority for us." Today, statements are arriving earlier than ever before, and Prospera members have noticed the difference. "In fact, we've even received compliments on the new statement layout, and how easy it is to read," confirms Flores.

Internally, credit union stakeholders are also noticing the difference. The marketing team is enjoying Doxim's easy to use business-to-business portal, which allows them to effortlessly upload and send transmittals, graphics, and messages for use on the statements.

Over in IT, the team appreciates how the same portal can be used to check on the status of statements easily 24/7. "The ability to track our statements is a feature I love," says Lori Parker, IT manager at Prospera. "I am able to communicate up-to-date statement information to staff, who in turn communicate it to members. We did not have this feature with our previous statement vendor and not knowing when statements were processed or mailed was frustrating."

## Transparency and Consistent Communication

Now that they have moved to Doxim's statement services, the Prospera team never has to wonder what's going on with their statements. Between the self-serve tracking offered through the console, and the immediate responsiveness of the Doxim Customer Success team, they experience total visibility into the statement composition, printing and fulfillment process. "For example, last month a member contacted us saying they had not yet received their statement," says Parker. "The team at Doxim was able to trace the statement all the way to the local post office and told me the date it went out for delivery, so I could work with the member. That's a night-and-day difference from our previous statement vendor."

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