

# APPCENTRICA CUSTOMER SUCCESS STORY

## Toronto Municipal Employees' Credit Union



TORONTO  
MUNICIPAL  
EMPLOYEES'  
CREDIT UNION

### Industry

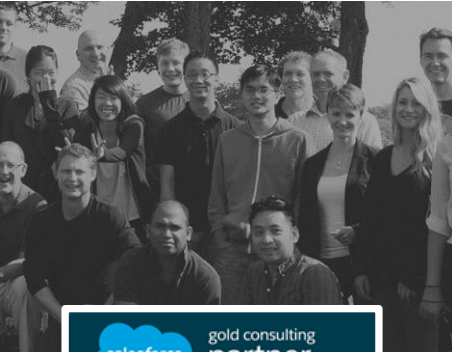
- Financial Services

### Project Outcomes

- Improved account visibility
- Streamlined customer acquisition
- Enhanced customer service

### Solution Features

- Sales Cloud
- Pardot



### About AppCentrica

We've built our Salesforce practice one customer at a time based on quality and strong relationships. We deliver proven solutions for:

- Sales Cloud + CPQ
- Service Cloud + FSL
- Einstein Analytics
- Community Cloud
- MuleSoft
- Pardot
- B2B Commerce
- Heroku & Custom Lightning Development

### About Toronto Municipal Employees' Credit Union

With over 75 years of expertise in financial banking, Toronto Municipal Employees' Credit Union (TMECU) is the only credit union that is bonded to the City of Toronto employees. TMECU offers a full range of banking, borrowing and investing services to over 7,000 members.

### Challenge

TMECU was challenged with maintaining their member base in the face of increasing competition with larger banks and other financial institutions. As part of their strategic response to these pressures, they looked to deploy Salesforce to increase membership, grow wallet-share with existing members, and assist in delivering exceptional customer service.

### Solution

After meeting with key stakeholders AppCentrica designed a comprehensive plan to implement Sales Cloud and Pardot. The implementation comprised two distinct phases. In phase one, AppCentrica focused on configuring Sales Cloud so that TMECU could better prioritize managing customer engagement and realize more immediate value. Improved lead assignment and follow-up processes were setup as well as several workflow automations to reduce time spent on previously manual work. Additionally, custom reports and dashboards were designed based on feedback from the management team.

Phase two introduced Pardot for marketing automation, enhanced customer insights, and more concise activity tracking.

### Outcomes

The implementation of Salesforce has established a solid foundation for TMECU, enabling them to modernize their customer acquisition and retention processes. Management has increased visibility and now can more accurately gauge the effectiveness of their offerings, and strategize accordingly. Their services team is empowered with more automation and a more consolidated view of customer data. These improvements and others have enabled them to spend more time focusing on customer management, which has led to higher conversion rates and improved member retention. TMECU is now looking toward phase two, to further increase the impact of their marketing activities with Pardot for the purpose of improved outreach to new and existing members.



*"As the CEO of TMECU, I know that innovation is the key to staying competitive and maintaining our Member focus in the financial services sector. Our team at Toronto Municipal Employees' Credit Union selected Salesforce as our Member platform and AppCentrica as our implementation partner. AppCentrica has the financial services experience and digital transformation expertise we needed. We are now using Salesforce to drive Member engagement, better marketing and increased wallet share and we look forward to deploying Pardot and geolocation capabilities to increase our marketing impact. With the ongoing help of AppCentrica, Salesforce will be a key technology that will enable us to fulfill our mission of bettering the financial lives of our Members."*



**Ivan Jankovic**

CEO, Toronto Municipal Employees' Credit Union