

Member Experience Challenges For 2019

Ralph Cumbee, SVP – CXO, Solarity Credit Union

Can You Hear Me?

- We are audio broadcasting so please plug in your headphones or computer speakers to listen in.
- If your audio is choppy or slow, you may wish to dial into the teleconference:

Dial: +1 (415) 655-0003

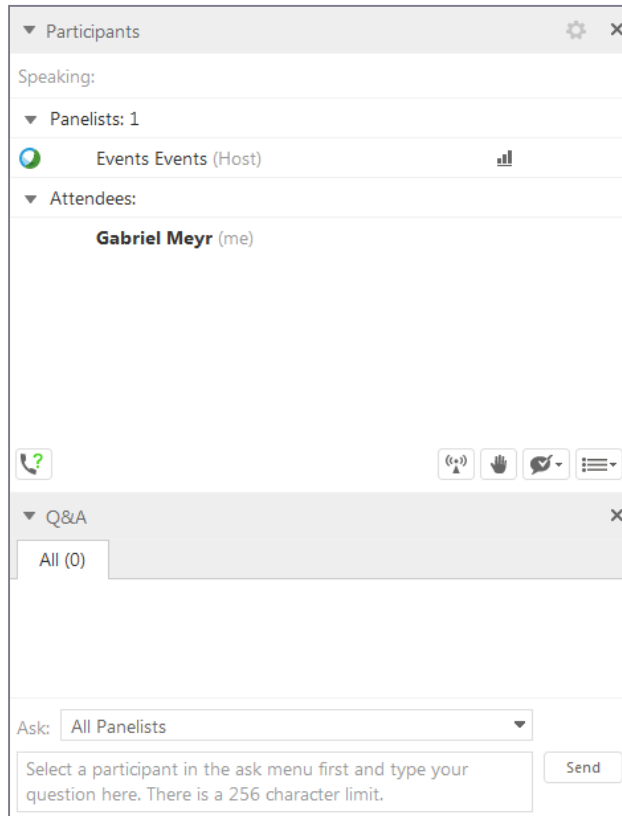
Enter access code: 668 604 022#

Slide Link

Today's slides can be found online at:

<http://bit.ly/2019-01-22-member-experience>

We Encourage Questions



Use the
Questions Box
located on the right side of
the screen, to type your
comments or questions.

Tell Us What You Think!



Please take our post-event survey. We value your feedback!

Member Experience Challenges for 2019

CHALLENGES

HOW ONE CREDIT UNION IS TURNING INTO TRIUMPHS.





The current
state of CX...

...AND SOME CHALLENGES

I am trapped here!





It's All About Uniting Silos for Effective CX

CUSTOMERBLISS







Say hi to SoFi Money.™

Introducing a hybrid account that earns you more and costs you nothing.

[Join Waitlist](#)

TM

Catching on to how great Money is?

We're just getting started.



Quick sign up

Sign up for SoFi Money and open an account in just 60 seconds. It's that easy.



Secure

SoFi Money is FDIC insured up to \$1.5 million with additional protection against fraud.⁵



Mobile

Your phone is your branch—complete with mobile transfers, photo check deposit, and customer service.



P2P transfers

Send money to anyone you need to right from our app. And when you send to SoFi Money holders, they'll get it instantly.



CX

Customer Experience

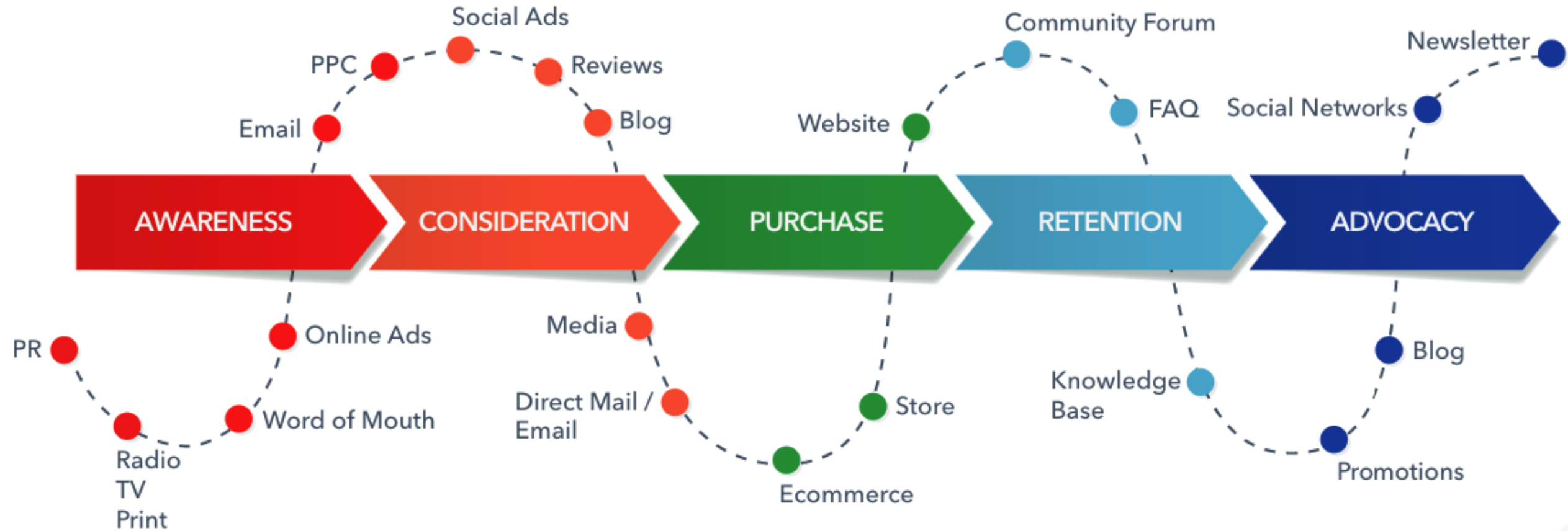
All possible interactions

UX

User Experience

Website, app, product

Digital Touchpoints

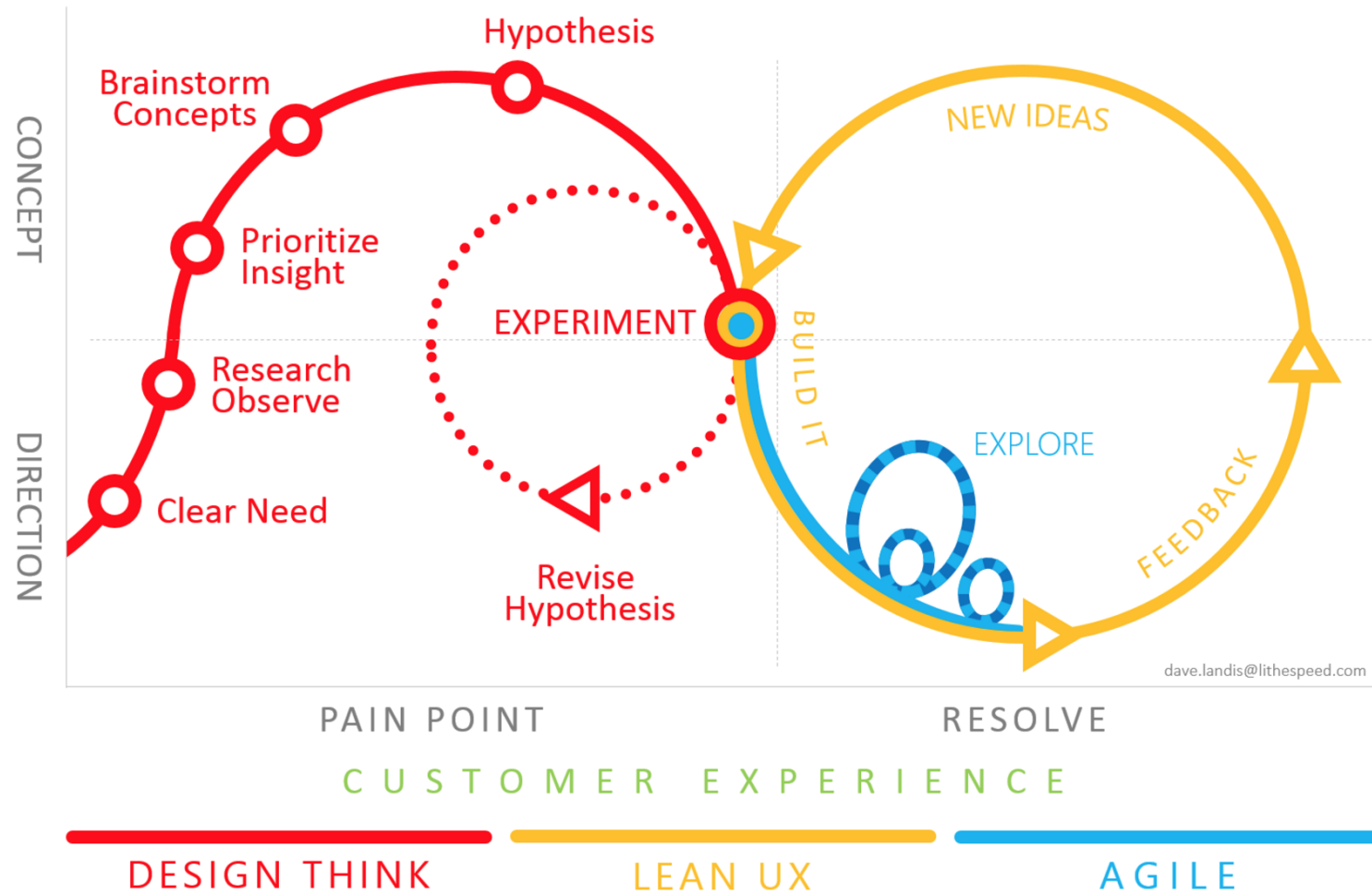








BETTER TOGETHER





Maribel

Rational

First Time Home Buyer

Female 26 years

Terrace Heights

Single



Cathy

Artisan

Refinance Shopper

Female 42 years

Selah

Married

Nurse

Makes \$50K - \$75K/Year

University Educated



Mary

Rational

Move Up Home Buyer

Female 52 years

West Valley

Married

Medical Transcription

Makes \$75K - \$100K/Year



Jerry

Guardian

Wounded Home Loan Warrior

Male 45 years

Yakima

Married

Software Engineer

Makes \$150K - \$175K/Year



Jim

Rational

Experienced Landlord

Male 55 years

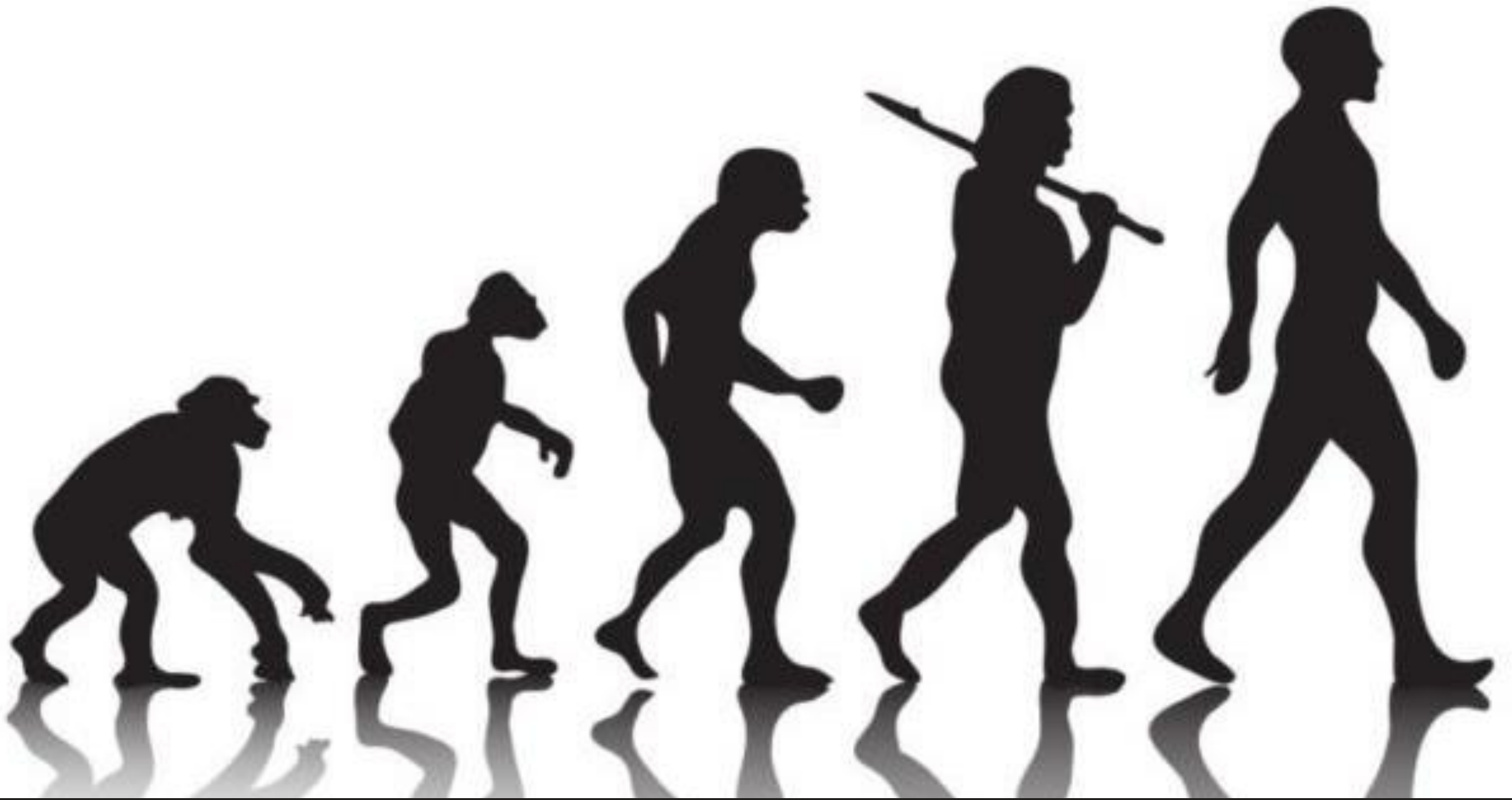
Ellensburg

Married

Property Manager

Makes \$100K - \$125K/Year



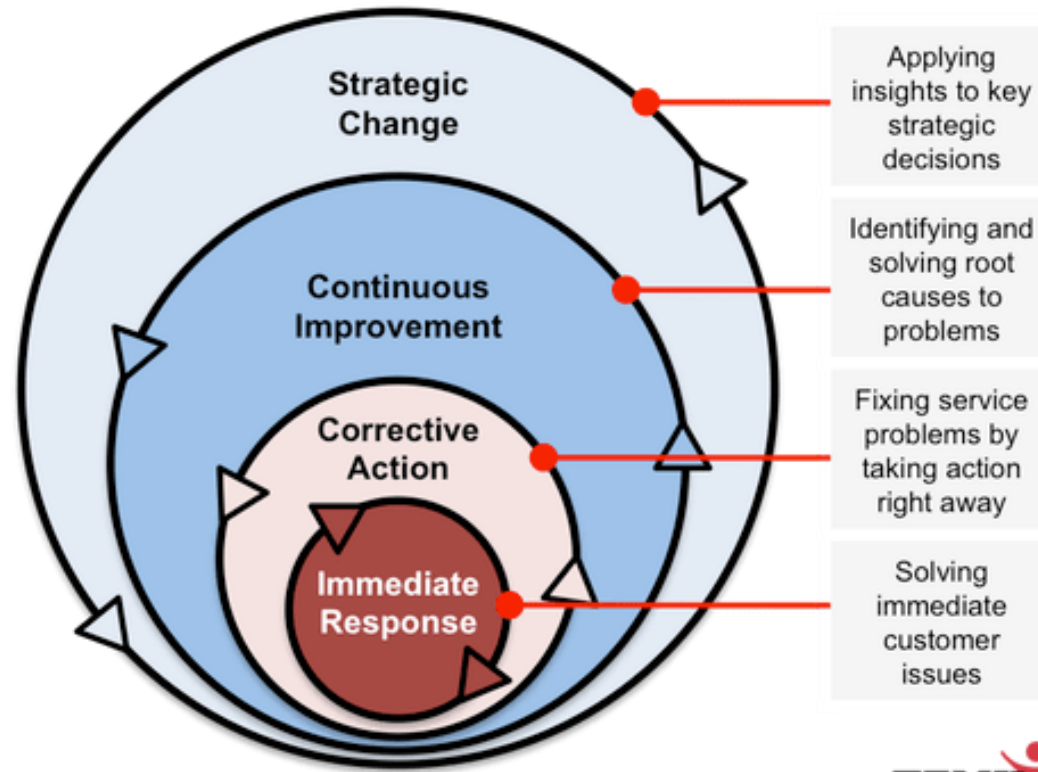




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The sweetest way to
Customer Delight

Four Customer Insight-Driven Action Loops



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- i. Experience design — or XD — is rapidly emerging as the discipline to rule them all. If exceptional CX is the goal, XD will get you there. By definition, **XD is a holistic, multidisciplinary approach to shaping every moment of the customer journey into a powerful, coherent whole.**
- ii. In its most powerful form, XD encompasses and impacts everything — from customer experiences to business model and employee culture. It requires long-range vision, detailed execution, and complex collaboration between teams and leaders, partners and suppliers. **But it is the future.**



Any
QUESTIONS