



Customer Success Story

How Everwise Credit Union Transforms Member Experience



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ABOUT COMPANY

Meet **Everwise** Credit Union.

\$5.7B

ASSETS

50+

BRANCHES

700+

EMPLOYEES

NEARLY

300,000

MEMBERS

\$1M+

2025 COMMUNITY
DONATIONS

225+

2025 ORGANIZATIONS
IMPACTED

3800+

2025 EMPLOYEE VOLUNTEER HOURS

What Prompted the Shift

1. Lack of cross-department transparency
2. Fragmented member service and communication
3. Undefined and inconsistent processes
4. Need for a unified platform

OUTCOMES

From Challenge to Change

Improved organizational readiness

Established a unified CRM foundation with cross-functional alignment on requirements, governance, and design

Defined and standardized processes

Member, sales, and service processes documented and standardized to reduce ambiguity and ensure consistent execution

Enhanced transparency across teams

Improved visibility into workflows, data needs, and dependencies between departments prior to system activation

Predictions of an improved member experience

Future-state workflows designed for consistency, responsiveness, and better interaction tracking

Operational efficiency benchmarks established

Baseline metrics and OKRs/KPIs set to measure adoption, service efficiency, and member outcomes



Thank you!