

# Evansville Teachers

## CASE STUDY



EVANSVILLE TEACHERS  
FEDERAL CREDIT UNION

### INCREASED SHARE OF WALLET

#### RESULTS

6x Balances Transferred,  
3x More Credit Cards.

Within two months, Evansville Teachers Federal Credit Union experienced:

5x increase in total aggregated accounts

41% adoption rate with 21% of total Money Management users aggregating their accounts

With MX Insight & Target, ETFCU ran a credit card campaign that brought in:

6x more balances transferred

3x more new credit cards than they had brought in previously

#### THE SITUATION

A way of improving financial well-being and customer loyalty.

Evansville Teachers Federal Credit Union (ETFCU) has always believed in a “people helping people” philosophy. As such, they’ve invested in digital money management (DMM) for years with the intent of improving their members’ financial well-being and maintaining user loyalty in the process. In 2016, ETFCU learned that their digital money

*“It’s a testament to the information that we’re able to get out of Insight & Target. And it’s so very important to the service, to use that data to help our members, save them money, and move them toward our products and services.”*



**MEAGHAN ELPERS**  
VP OF OPERATIONS  
EVANSVILLE TEACHERS FCU

management product would be migrated to the MX platform. Since they’d seen good results with their prior DMM product, ETFCU was excited for the migration and the additional functionality they would gain with the new Money Management solution powered by MX

## #1 SOLUTION: DIGITAL MONEY MANAGEMENT (DMM)

---

A huge increase in those aggregating all their accounts.

ETFCU ended up being the first client to migrate to the new Money Management solution powered by MX, and the results were impressive. Within two months, ETFCU saw a five-fold increase in total aggregated accounts and reached a 41% adoption rate with 21% of total Money Management users aggregating their accounts.

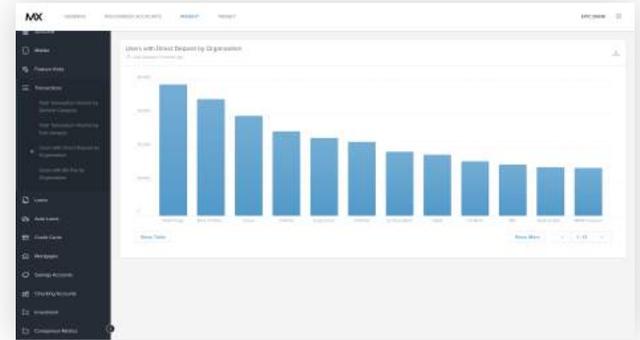
ETFCU was also able to put their money management product to better use by integrating it directly into the mobile experience (something they were unable to do until they integrated with MX). This opened up Money Management features to a range of mobile-first members and increased the appeal of the mobile experience at ETFCU, improving the likelihood that these users will stay loyal to the credit union.

*Learn more at [data.mx.com](https://data.mx.com)*

## #2 SOLUTION: INSIGHT & TARGET

---

A dramatic return on investment.



In addition, ETFCU integrated the MX Insight & Target platform along with Discovered Accounts, resulting in a dramatic return on investment. For example, they used the fresh data gathered from Money Management to re-run a credit card campaign and brought in six times more balances transferred and three times more new credit cards than they had brought in previously — all because they were able to create hyper-personalized offers that got real results.

*"We're very happy with the MX experience. We want to live our philosophy of 'people helping people,' and MX and NCR's Digital Insight solution allows us to do that. We can offer products and services to our members that save them money. We can compete with the big banks now that we have the data to gain insights into our members' financial picture and really help them. Money Management and Insight & Target has allowed us to do that."*



**MEAGHAN ELPERS**  
VP OF OPERATIONS  
ETFCU

*"It's a testament to the information that we're able to get out of Insight & Target, and it's so very important to the service, to use that data to help our members, save them money, and move them toward our products and services."*

*"We were preparing for an uptick in call volume and complaints after we made the switch, but the implementation was seamless. We didn't really see an increase in call volume, which is a testament to the usability of this financial tool."*