

## Bellwether Community CU Rolls in New Loans with Seamless Execution & Results

Bellwether Community Credit Union wanted to do more to reach members who were in need of loans and needed a more efficient way to bring in those members to help them with their specific financial situation. Bellwether put their trust in Ser Tech's secure, data-driven Fetch Marketing program. Using targeted credit data provided by Ser Tech, the results have been fantastic year after year for the \$530 million credit union in Manchester, N.H.

### EXCELLENCE THROUGH EXECUTION

While Ser Tech's data-driven Fetch Marketing products are ideal for helping Bellwether Community CU grow loans safely, the other element that caught the attention of Bellwether Community CU Senior Digital Marketing Coordinator Katie Bisbo was the care the Ser Tech team takes to understand the credit union's needs.

"The sales process was nothing but simple and straightforward from the start," Bisbo explains. "The team presented a great product with clear goals that fit our industry and loan needs. Once we saw all the services they offered, there was no doubt we'd be working with them."

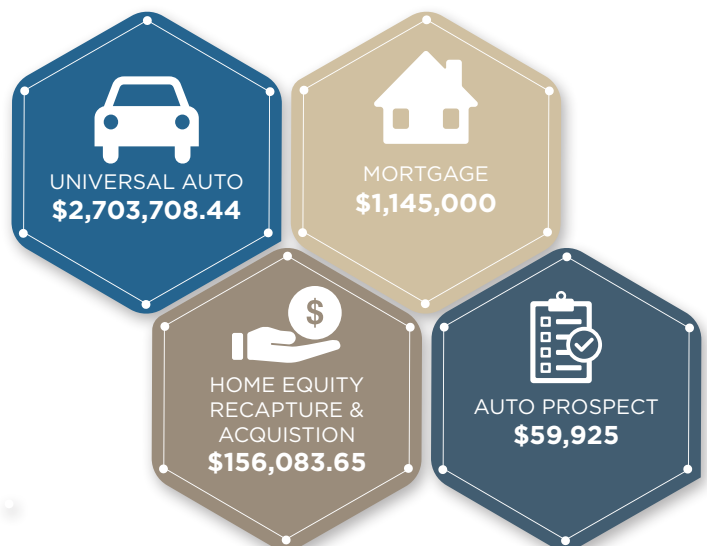
She adds, "[Ser Tech Sales Executive Scott Adams] really seemed to understand our needs, understand the budget we were working with and always responded promptly. He wasn't just selling us a product – Scott was genuinely interested in finding what worked for us and suggesting new ideas or design concepts along the way."

Bellwether engages Ser Tech across multiple product campaigns...



*"What keeps me coming back to Ser Tech is the ease of implementation and execution, along with the results, including the data extract files that we are able to use here at the credit union for additional contact to qualified members. And, Scott has done a great job of helping us stick to our budget while still getting results."*

—Katie Bisbo, Bellwether Community CU



...and is very pleased with its 2019 results from Ser Tech Fetch Marketing campaigns!

## EASE OF IMPLEMENTATION

The Ser Tech team works with your member data and our credit bureau partners to identify qualified consumers who are most likely to be in the market for a loan based on the credit criteria of your financial institution. We work side-by-side with your team to create a professionally designed, customized offer and distribute the offer on behalf of your organization through direct mail, email and online via home banking.

"We were able to get our IT in contact with the Ser Tech team so that they could get the exact information needed," Bisbo shared. "They could ask any security risk questions they had and were able to create an export they could sent each month, which made the implementation process much more streamlined."

She continued, "That left our marketing team to just do the design work for the campaigns with the help of Ser Tech's marketing team. Ser Tech provided us with samples to review to help get the designs started and also let us create our own designs. Any changes or updates were made quickly via email to keep the process moving along on time."

## RAPID RESPONSE

From sales to marketing to the operations team, Ser Tech takes great pride in providing friendly service and useful advice to our clients. "All issues have been handled and resolved in a timely manner," Bisbo added. "Scott is really great about getting back to us with an answer or a response to let us know he is researching a scenario for us."

"Same goes for the design team, they are quick to respond with any last minute changes we have or issues that we discovered from a previous campaign."

## LEVERAGE SER TECH TO REACH CONSUMERS

- Employ the power of credit bureau data to prescreen and monitor consumer activity and identify optimal loan generation opportunities
- Deliver compelling, FCRA-compliant and customized offers
- Increase return and minimize staffing resources with all-inclusive, turnkey programs that are designed to bring in loans to your financial institution
- Minimize marketing costs by targeting only creditworthy borrowers based on your credit criteria and underwriting guidelines
- Increase your market share by recapturing loans that your customers financed elsewhere
- Create cross selling opportunities

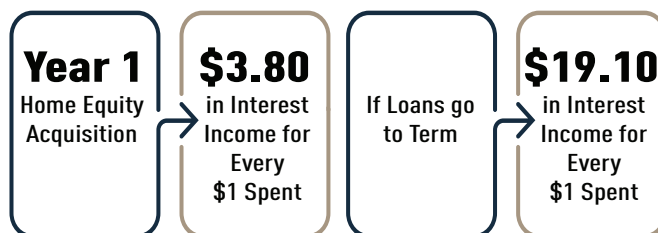
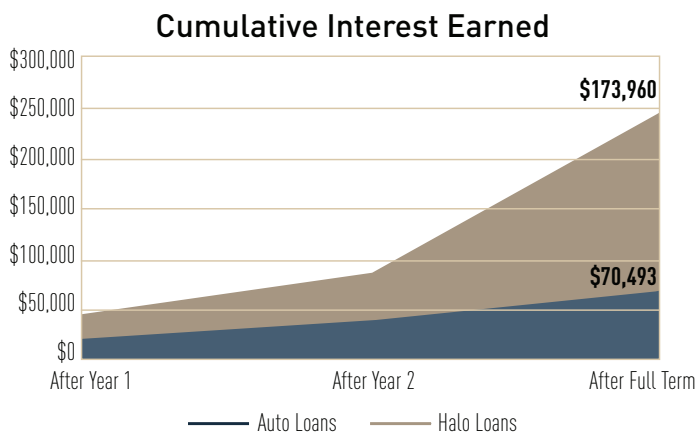
## HOME SWEET HOME

Whether revving up its auto loan portfolio or saving a borrower money with a home equity refinancing, Bellwether Community CU finds its stability in Ser Tech. The company has delivered a strong ROI on Bellwether's campaigns and made it easy to execute and measure results. It took just more than two months for Bellwether to recoup its universal Fetch Marketing campaign expense and a little more than three months for the home equity acquisition campaign!

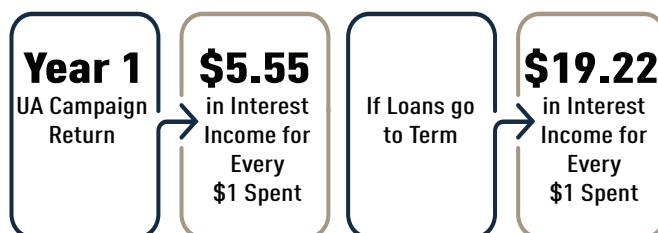
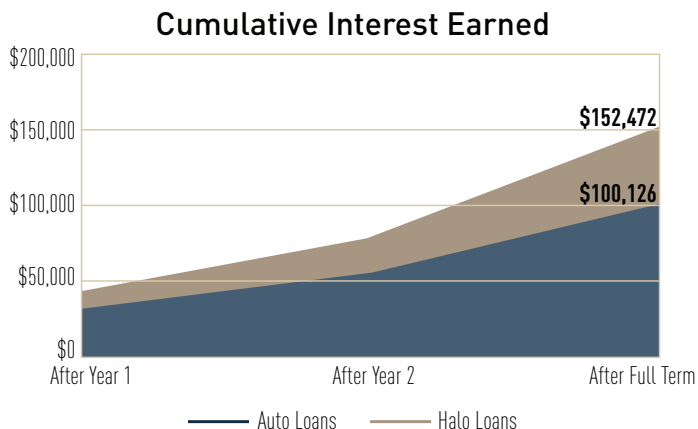
"The ease of implementation and execution, along with the results, keeps us with Ser Tech," according to Bisbo, "including the data extract files that we are able to use at the credit union for additional contact to qualified members."

"And, Scott has done a great job of helping us stick to our budget while still getting results!"

## HOME EQUITY ACQUISITION FETCH MARKETING CAMPAIGN & CROSS SELL RESULTS



## UNIVERSAL AUTO FETCH MARKETING CAMPAIGN & CROSS SELL RESULTS



*We believe in responsible consumer credit services. People should have access to fairly priced credit, whether personal, credit card, vehicle, student or mortgage loans. Fair credit helps families and their communities to thrive and grow. That is why Ser Tech is uniquely focused on developing financial technology services to help lending institutions empower lives.*

—Ser Tech Founder/CEO Shana Richardson



### **SCOTT ADAMS**

**Sales Executive**

469.385.6994

Scott.Adams@SerTech.com

This Indiana native has worked to help lenders grow for more than 30 years!



### **DAWN KOESHALL**

**Sales Executive**

469.916.6924

Dawn.Koeshall@SerTech.com

Dawn, an avid hiker, has been working with credit unions for more than 30 years!

## **CONTACT SER TECH TODAY!**



Ser Tech is a financial technology services company that leverages credit data to help clients target consumers to generate new loans, provide FICO® Scores and credit education for consumers, and identify, measure and manage portfolio risk and opportunity through comprehensive loan management. Ser Tech is headquartered in Dallas, serving more than 3,000 credit unions since 1994.