



Member Relationship Management – Connections

Point, Click, and Connect with Your Members!

EPL provides a turn-key application for not only managing your member relationships, but strengthening those relationships while increasing the credit union's bottom line.

Key Features

- AUTOMATED Sales & Marketing Tool that responds to a member's behavior or specific transaction activity.
 - The member does something ... an "event"
 - The system responds automatically ... within 24 hours with a ...
 - Targeted direct mail piece, email message, postcard, newsletter, other
- Significantly improves CROSS-SELLING RESULTS and member retention while targeting new members for marketing campaigns and/or promotional activity.
- Over 80 Customized Templates Built-In & Ready for Use to Target Events such as:
 - Open or Close an Account
 - Pay Off an Installment Loan
 - CD about to Mature
 - Balance Shifts (Up or Down) within an Account
 - Branch Opening
 - Top Depositor Events
 - "Life Events" (Birthday, Anniversary, Wedding, Etc.)
- Other Capabilities:
 - Organizes accounts into households and CASS-certifies the record.
 - Appends Demographic Data to the household record
 - Calculates the relative value of each household to the institution.
 - Predicts what products or services a household is likely to buy next.
 - Produces & Sends direct-mail or other promotions to targeted households.
 - Measures the ROI of all promotional or other system-generated marketing activity.
 - Tracks employee cross-selling and referral activity.
 - Provides contact-management function to help track all member interactions.
- Easy to Learn – Easy to Use – Easy to Implement
 - No Hardware or Software to Buy or Maintain
 - Intuitive Screens & Common Terminology
 - Robust and Highly Secure
- Cost-Effective ... Implement for a Fraction of the Cost of Older Technologies