TOKARA SOLUTIONS®

Evangelical Christian Credit Union

Financial Services

Salesforce CRM

Who They Are

Evangelical Christian Credit Union (ECCU) is an alliance of Christian churches, parachurch ministries, schools, workers, and individuals. Founded in 1964, ECCU is headquartered in Brea, California and **provides financial services to an international clientele**. ECCU services more than **315,000 members and handles over 3.8 billion in assets.**

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Solutions

When ECCU began to look into migrating from Legacy Pivotal CRM, their goal was to move away from the traditional transactional relationship culture to a relationship oriented culture. Early on, ECCU knew Tokara was the company for them. With deep knowledge in not only CRM solutions but specifically Pivotal, our team had the advantage of being able to point out the alternatives and advantages of systems, as well as potential pitfalls. **The Tokara team collaborated with ECCU in Vision Workshops, identifying goals, and learning what makes ECCU unique to their clientele**. Through these talks, both teams came to the decision that a migration to Salesforce CRM enabled ECCU to identify areas that could be problematic and allow for behavior and activities to closely match the goals of the organization.

Success Story

With ECCU's trust in our guidance and knowledge of how to structure a complex system, the Tokara team successfully implemented Salesforce CRM. Subsequently, Tokara **reduced the number of systems ECCU's frontline employees had previously been using, from 9 different systems to one simple solution.** In Addition, the implementation of Salesforce helped employees take a proactive approach to meeting customers' needs, allowing them to know their customers before call centers even answered their calls.

> "Simplifying their processes allowed for the credit union to fulfill one of their many goals: to make banking with ECCU the easiest financial experience for their customers."