



# University Federal Credit Union

Financial Services

Pivotal CRM

## Who They Are

Founded in 1936 by faculty and staff of The University of Texas at Austin, University Federal Credit Union (UFCU) now has more than 20 branches in and around Austin and Galveston, Texas. Serving UT students, alumni, employees, as well as other Texas residents, the member-owned cooperative **provides a variety of banking services, including checking and savings accounts, IRAs, credit and debit cards, commercial real estate loans, and home and consumer loans. It also provides investment, financial planning, and insurance brokerage services.** University Federal boasts more than \$3 billion in managed assets and more than 300,000 members/owners.

## Solutions

For over a decade, UFCU has been a loyal Pivotal customer. In 2014, UFCU made the strategic decision to enhance their Pivotal system. UFCU looked to Tokara Solutions to augment their IT team so that their Pivotal instance could provide maximum value to their end users. Their overarching goal was to **consistently enhance Pivotal CRM to successfully compete in the everchanging banking marketplace by offering members an exclusive, enhanced customer experience.** As the business has changed over the years, UFCU has required a very flexible application that can be quickly enhanced and integrated with other critical, internal business applications.

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Tokara Solutions has consistently provided the type of consultants that work seamlessly with our internal IT team and that live up to our high standards and expectations.

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## Success Story

With Tokara Solutions' guidance, CRM seniority and Pivotal expertise, UFCU have deployed enhanced member services, backend system integrations, and UI improvements. Tokara Solutions works closely with UFCU to design, develop, test, and deploy each new update to Pivotal as their business evolves due to their competitive environment and changes in regulations. **The delivery of a more consistent and efficient business process contributes to decreased operating costs and enhanced member experiences.**

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Since 2014, Tokara has successfully completed over 30 Pivotal CRM projects impacting all areas of UFCU's business, including member services, investments, and insurance.

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