VERITY CREDIT UNION

FINANCIAL SERVICES

Pivotal CRM

Who They Are

Verity Credit Union is a not-for-profit credit union originally established in 1933 as Postal Works Credit Union #8 to serve members in select Washington state counties. Verity is a credit union that **prioritizes people, the planet, and prosperity** to make meaningful, positive and lasting change in the world. Verity focuses on providing personal and commercial financial services, has over $580 million in assets, and serve more than 33,000 members in the greater Seattle area.

Solutions

Verity Credit Union is a long-standing Pivotal customer that integrates their CRM into several key systems. Like all credit unions, Verity is required to **run individual systems for their core banking, loans origination, bill payment, call center, marketing, and more.** Verity has seamlessly integrated Pivotal with multiple third-party systems so that their employees can have a single point of reference, providing a higher quality of service to their members. However, with the desire to utilize multiple systems more efficiently, Verity looked to Tokara Solutions to bring in our experience with CTI projects and install and configure our integration between Pivotal and Marketo.

> " What Verity Credit Union appreciates most about working with Tokara is not having to reinvent the wheel or invest in staff time to recreate solutions that Tokara has already crafted and implemented across their customer base. This allows us to dream big! "
>
> Brittney Fraser, Project Manager

Success Story

Verity Credit Union was able to take more steps towards their ongoing drive to improve the overall system experience for their employees. Verity is now able to have inbound phone calls and open/create records in Pivotal in real-time. Likewise, their Marketing teams have immediate access to send and receive key Pivotal information. **Verity Credit Union and Tokara Solutions continue to work together to insure the constant improvement** of their CRM and how it fits into Verity's sophisticated technology environment.

> " Tokara Solutions remains committed to continuing to work with Verity Credit Union to insure constant improvements of their current CRM software. "