

CASE STUDY

Website design and
development on Sitecore®
Web Content and Experience
Management Platform
Digital Strategy and
Hyper-personalization for
Credit Union of Texas.



SILVERTECH

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IT TAKES CLIENT AGENCY COLLABORATION TO CREATE A CUSTOMER-FRIENDLY CONVERSION MACHINE

We've all been there. That time when you browsed online information about a product or service, and next thing you know, an ad pops up on your social feed of that exact item. Or, when you are shopping on sites like Amazon, and a product complementary to a previous purchase is suggested to you. We call that meaningful content.

Credit Union of Texas (CUTX) understood that meaningful, personalized content is crucial to map buyers to the right information at the right time. They came to us looking to leverage digital channels to improve their online experience and to increase product conversions. SilverTech was engaged to help CUTX completely transform the way their customers were able to conduct business online. By creating personas, detailed user journey maps, customized content, strong calls-to-action, and guided product selection tools, the result is a site that is convenient, ADA accessible and easy to use.

A conversion-machine, the CUTX site pushes the envelope with a build-and-price your own vehicle wizard — integrated with Kelley Blue Book — that allows customers to find a car, choose model and trim packages, get an auto loan rate and apply for the loan, all without ever leaving the CUTX website.

Between the personalization features that display more relevant content with each interaction, lifestyle pages that consolidate relevant products, calculators, and helpful wizards that provide customers education and

guidance, you won't recognize the new CUTX site as a traditional 'bank' website. That's ok, because today's digital consumers expect way more than most traditional credit union websites offer.

Although we knew the site would be a winner, we were elated at how quickly CUTX started realizing their success. The numbers are so impressive, SilverTech and CUTX marketing execs have even been invited to speak about their rapid growth at financial industry conferences and tradeshow.



THIS IS HOW WE APPROACH PERSONALIZATION:

Crawl

Identify your personas, their journeys, and content needs.

Provide personalized recommendations based on behaviors, situational, historical information.

Walk

Begin to add external data sources to further segment your users.

Personalize based upon user data.

Run

Provide specific promos to your known users, 1:1 conversations.

Leverage your internal data.

Sprint

Omni channel and AI/ML, Predictive modeling.

Next best product based upon transactional history.

2 SERVICES

- › Buyer Persona Development
- › Personalization Strategy & Implementation
- › Website Redesign
- › Sitecore Content Management Implementation
- › Salesforce Marketing Cloud Implementation



3 RESULTS

363%

Growth in total leads
within the first month.

54%

Of visits were getting
personalized content.

284%

Growth for submitted leads.

30%

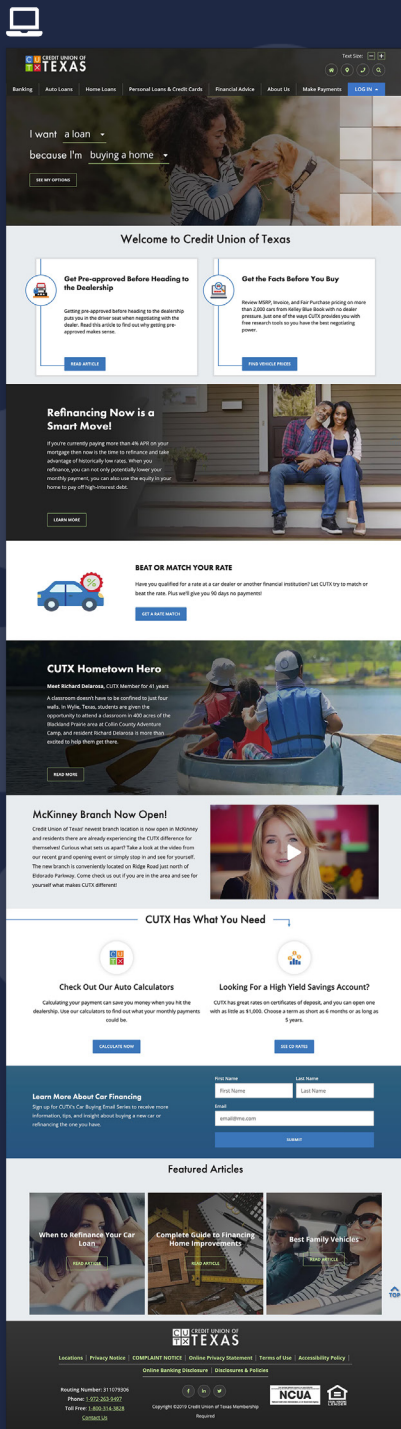
Increase in auto loan leads.

20%

Increase in home
equity & mortgage applications.

4

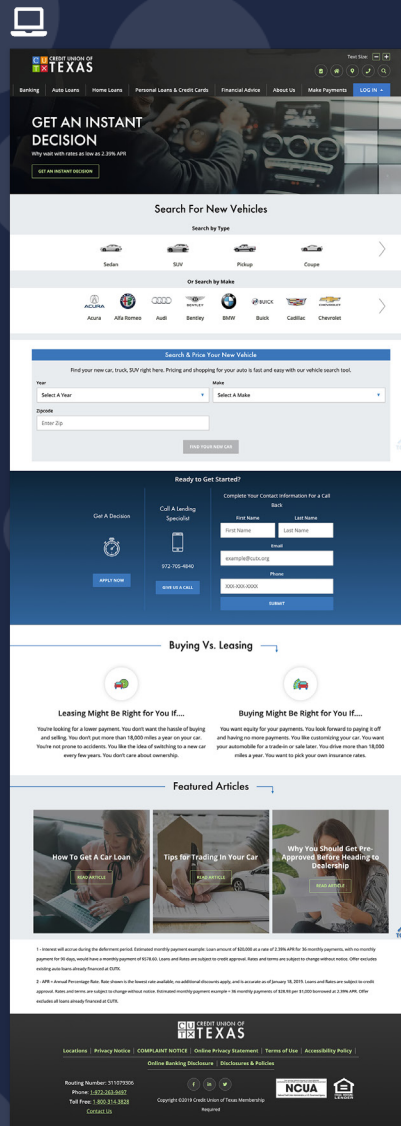
FROM BACK STORY TO SUCCESS STORY, SILVERTECH CHANGES THE GAME



The desktop view of the Credit Union of Texas website features a clean, modern design. The header includes navigation links for Banking, Auto Loans, Home Loans, Personal Loans & Credit Cards, Financial Advice, About Us, and Make Payments. A prominent banner at the top reads "I want a loan because I'm buying a home" with a "Get an instant decision" button. Below this, a "Welcome to Credit Union of Texas" section offers two paths: "Get Pre-approved Before Heading to the Dealership" and "Get the Facts Before You Buy". The "Refinancing Now is a Smart Move!" section highlights the benefits of refinancing. A "BEAT OR MATCH YOUR RATE" section encourages users to compare rates. The "CUTX Hometown Hero" section features a story about a local resident. The "McKinney Branch Now Open!" section announces a new branch location. The "CUTX Has What You Need" section includes links to "Check Out Our Auto Calculators" and "Looking for a High Yield Savings Account?". A "Learn More About Car Financing" section provides a form to request more information. The "Featured Articles" section displays three articles: "When to Refinance Your Car Loan", "Complete Guide to Financing Home Improvements", and "Best Family Vehicles". The footer contains contact information, a privacy policy link, and a "NCUA" logo.



The mobile view of the Credit Union of Texas website is optimized for smaller screens. It features a simplified navigation menu and a focus on the "GET AN INSTANT DECISION" banner. The "Welcome to Credit Union of Texas" section is condensed, and the "Refinancing Now is a Smart Move!" section is reworded. The "BEAT OR MATCH YOUR RATE" section is also condensed. The "CUTX Hometown Hero" section is reworded. The "McKinney Branch Now Open!" section is reworded. The "CUTX Has What You Need" section is reworded. The "Learn More About Car Financing" section is reworded. The "Featured Articles" section is reworded. The footer is reworded.



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