

Helping Consumers Take Charge of Their Finances

Pacific Service Credit Union Uses EVERFI to Provide Value to Their Consumers



The Problem

Pacific Service Credit Union (Pacific Service CU) is more than a business—it's an organization that cares about its consumers. "It really is about being helpful and providing value," says Digital Marketing Manager, Bryan Lyons. "The more our consumers know about finances, the better decisions they can make, and the more prosperous their futures can be."

Knowing that consumers may be lacking critical financial knowledge, Pacific Service CU partnered with EVERFI. EVERFI's powerful financial education platform empowers consumers, enables them to take charge of their future, and educates them on the fundamentals of finance.

The Process

Integrating EVERFI with the Pacific Service CU team was effortless. "We've done a lot of implementations over the years," says Lyons, "and this one was the easiest." The seamless implementation made it possible for Pacific Service CU to roll out their financial education program in time to take advantage of Financial Literacy Month, which occurs every April.

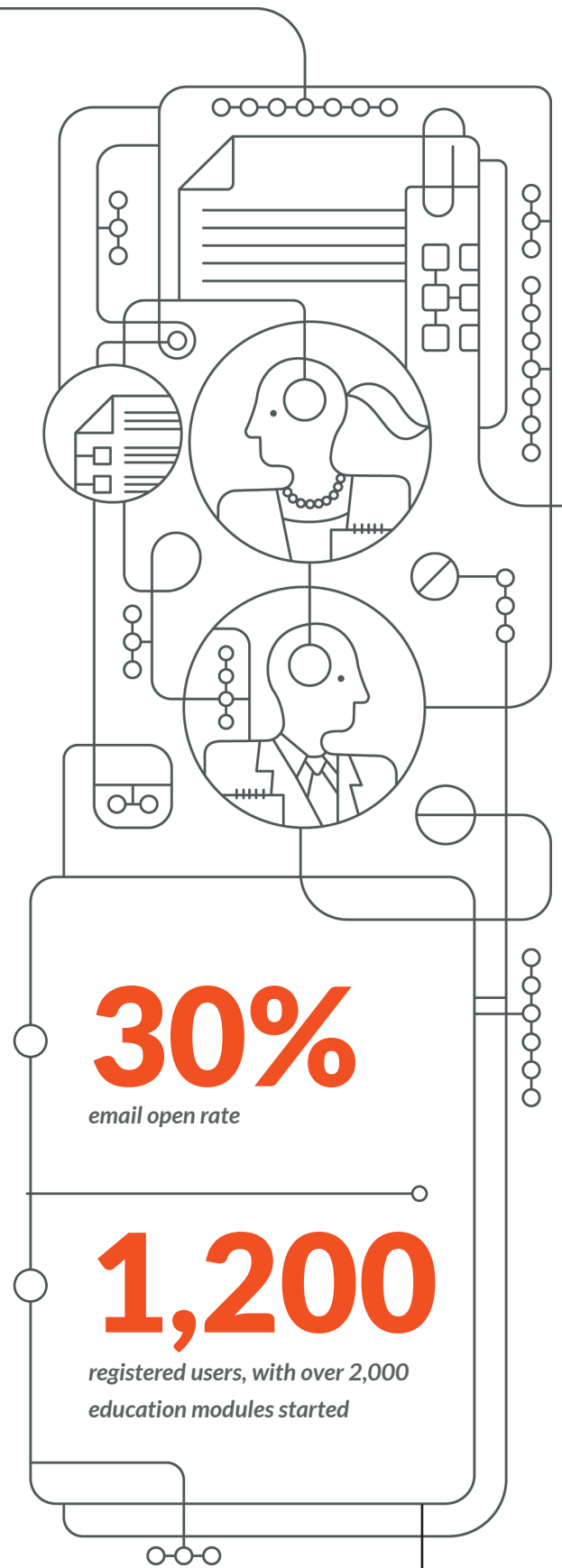
To launch the Financial Fitness program, the credit union offered a six week incentive. Consumers received \$10 upon completing one of the four self-paced programs. The programs include Managing Your Money, Borrowing and Saving, Protecting Your Finances, and Planning for the Future.

To advertise the program, Pacific Service CU and EVERFI implemented a multi-faceted approach. Getting consumers to be financially fit began with banner ads on the credit union's home page and links to the modules throughout their website. They also promoted the program on their Facebook and Twitter channels.

The most effective promotion, however, came from Pacific Service CU's email campaign. The campaign achieved an impressive 30 percent open rate and 3.7 percent click-through rate, resulting in 127 consumers qualifying for the \$10 incentive.

The Result

After only six weeks, the Financial Fitness program achieved more than 1,200 registered users, with over 2,000 education modules started. With this success under their belt, Lyons says, "The credit union is motivated to do even more. Pacific Service CU plans to increase our educational programming, using EVERFI's platform and targeted services as the backbone of our overall financial wellness strategy." Lyons notes, ***"With EVERFI, it's easier than ever to help our consumers have a better, more prosperous future. We feel good that we've empowered them to make better choices going forward."***



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