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Better Branches Releases Member Referral Management System

SAN FRANCISCO, California - Better Branches, a CUSO specializing in front and back office workflow solutions, has announced the release of a new Member Referral Management System for credit unions. The Referral Management System is designed to be a key component of a credit union's inbound and outbound sales plan, placing focus on increased wallet share and loyalty through more efficient and effective member interactions.

The technology behind the Better Branches Referral Management System enables any staff member to refer a member or non-member lead to any other department or staff member within seconds. Using innovative technology, employees can quickly and easily identify member needs, refer opportunities to the appropriate product expert or sales team, and track the status of each referral. Additionally, the Referral Management System presents each referral in a list that can be sorted many different ways, and it provides a follow up list of leads for department specialists to work. It also contains escalation controls that notify the appropriate staff if an assigned lead or referral is not acted upon promptly. Optionally, the system can gather information to support compensation for lead referrals.

Better Branches' Referral Management System is designed to be flexible and customizable in order to meet the specific credit union needs. It integrates with a credit union's existing operating system to keep adoption costs and training time at a minimum. From tellers to managers, staff throughout the organization can easily utilize the intuitive system because it fits seamlessly into their natural workflow. Credit unions also benefit from Better Branches implementation and operational experience during installation.

"Member referrals are the ultimate form of viral marketing," says Rick Poulton, President of Better Branches. "Especially during difficult economic times it is important that credit unions foster word of mouth referrals in order to grow wallet share. Our Referral Management System increases a credit union's effectiveness by ensuring that referrals are consistently captured, disseminated, and acted upon across the entire organization. It connects members to the proper product specialist who can offer the right products and services at the right time."

Better Branches is a CUSO founded in partnership with SAFE Credit Union of North Highlands, California. Better Branches merges best practice workflow with innovative information technology to help credit unions improve service, increase sales and lower operating costs.

For more information, contact Rick Poulton, President of Better Branches, at (925) 261-1266 direct, or (866) 444-8344 toll free, or email rick.poulton@betterbranches.com. You can learn more about Better Branches on the web at www.betterbranches.com.

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