BECU

BECU creates 360-degree, data-driven customer journey with Amperity

BECU, a not-for-profit credit union headquartered in Washington, USA, places customer centricity at the heart of its business but it needed richer visibility into its customers. The leading financial institution lacked a holistic view of the customer, with legacy silos and business units limiting visibility across the customer value chain. The organization wanted a smart way of leveraging its customer data to transform member engagement and enhance experiences.

With the goal of gaining a 360-degree view of the customer to create data-driven journeys in mind, BECU partnered with Amperity on a pilot project of its unified customer data solution to see if it would meet strict industry regulations and privacy requirements, while still transforming the use of data and customer insights across the business.

Creating a single, accurate view of the customer

BECU had significant quantities of customer data but lacked a central location to aggregate and organize the data in a way that was accessible and easy to understand. Without a consolidated space to store member data, it was difficult to analyze the information and unpack insights that could be used to better serve customers, and data powered by Amperity helped improve their ability to provide the

25+ hours saved on weekly email dashboard reporting

50+ hours saved on digital marketing teams' outbound execution

End-to-end automation and a 360-degree view of members for proactive service and customer care

INDUSTRY: Finance

SUB-VERTICAL: FinTech

INDUSTRY PRIORITY SCENARIO: Leveraging data and insights to break down silos and gain visibility into customers to deliver better service and experiences.

"

Amperity is the hub, the brain and syndicating out all this information to our execution or analysis channel."

**Brian Knollenberg,
Senior Vice President of Marketing at BECU**

Microsoft Azure

right services and solutions at the right time. The volumes of data received by BECU daily were manually processed and organized, which meant the data was difficult to maintain, often outdated, and still lacked a single view of the customer.

The company also wanted to consistently improve how it met customer expectations. Consumers provide significant information to their financial institutions, most of it sensitive, and they expect experiences and services that reflect this data. However, BECU wanted a smarter way of consolidating disparate data and creating an accurate, single view of the customer so it could continue to provide exceptional service offerings that reflected ever-shifting customer needs.

The customer data solution provided BECU with rich insights into its member base across multiple touchpoints, such as the products and services used, how they engaged with the credit union, and what stage they were at in their financial journey. The solution leverages artificial intelligence (AI) to provide a comprehensive and actionable customer-360 that improves marketing performance and fuels accurate customer insights. One of the primary reasons BECU chose Amperity's platform is because of the seamless integration with Azure, and other existing tools within their marketing stack such as Salesforce and Tableau.
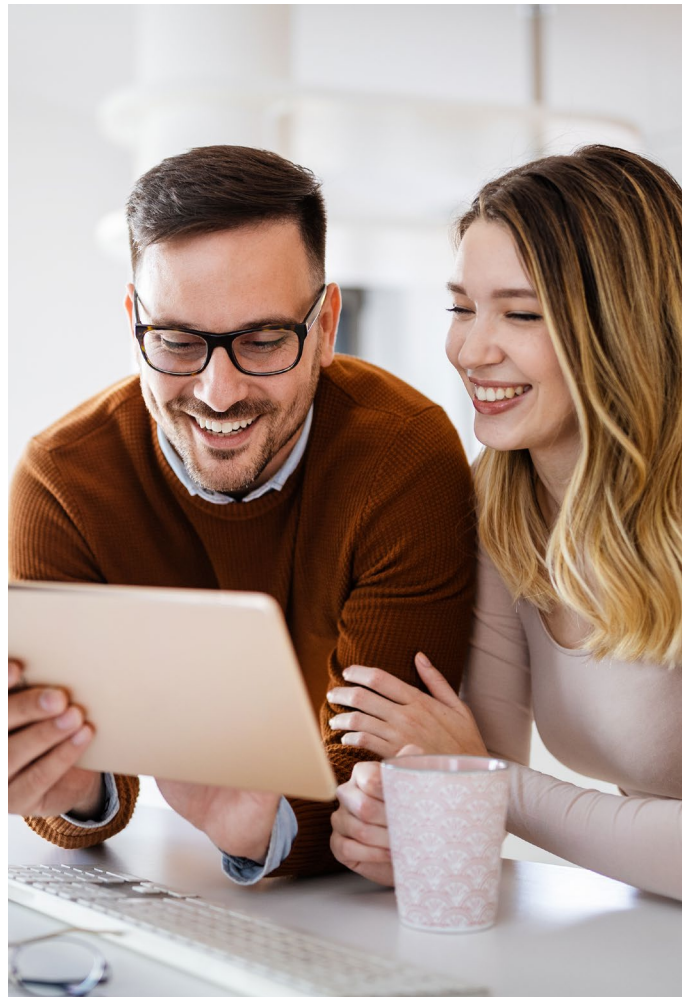
Delivering a data-driven customer journey

The Amperity platform stitched together customer records from previously siloed systems, delivering to BECU a dedicated database for uncovering rich and detailed customer insights. This gave different teams the ability to access and use the same data sets, resulting in improved decision-making and customer journey development.

The solution simplified BECU's compliance with California Consumer Privacy Act (CCPA) regulations and future-proofed the infrastructure to ensure it would remain compliant as these regulations evolved. In addition, the Amperity platform can now help BECU comply with banking regulations by supporting their ability to drill down into a single view of a customer with a higher level of accuracy often required for reporting.

Microsoft Azure
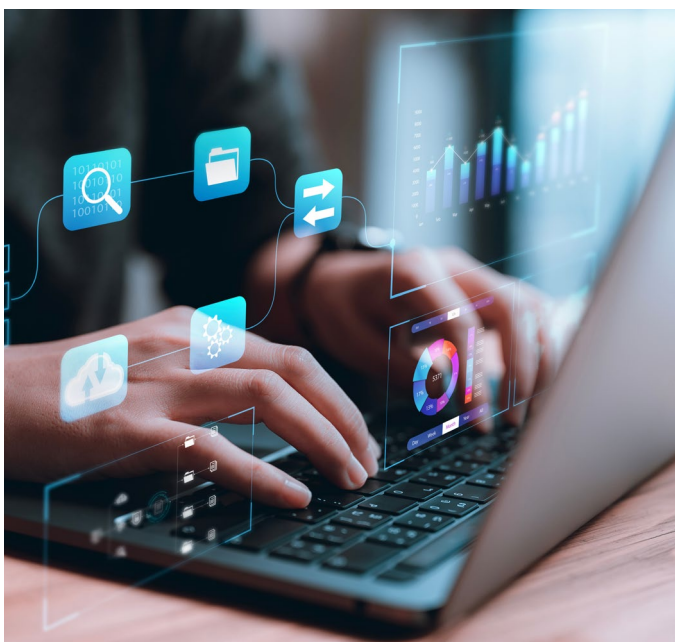
Driving down business costs and delivering speed to value

BECU also saved more than 25 hours on weekly email dashboard report building, and more than 50 hours per month on digital marketing teams' outbound execution. The platform also enabled the team to run more than 130 segments monthly, leverage the Amperity Sandbox environment to safely test database changes before pushing to production, and created a direct line of sight for the Member Services team to tie member interest in new product requests and more to a member's unique customer profile.

Finally, the solution allowed BECU's marketing teams to repurpose significant time usually spent on admin and manual processes. The platform not only automated execution processes, but the speed of its processing capabilities meant that member insights are consistently up to date so that personalization, engagement, and experiences are seamless across the customer base. Having a single customer view has transformed marketing reach and functionality, including how the company refines its customer journey.
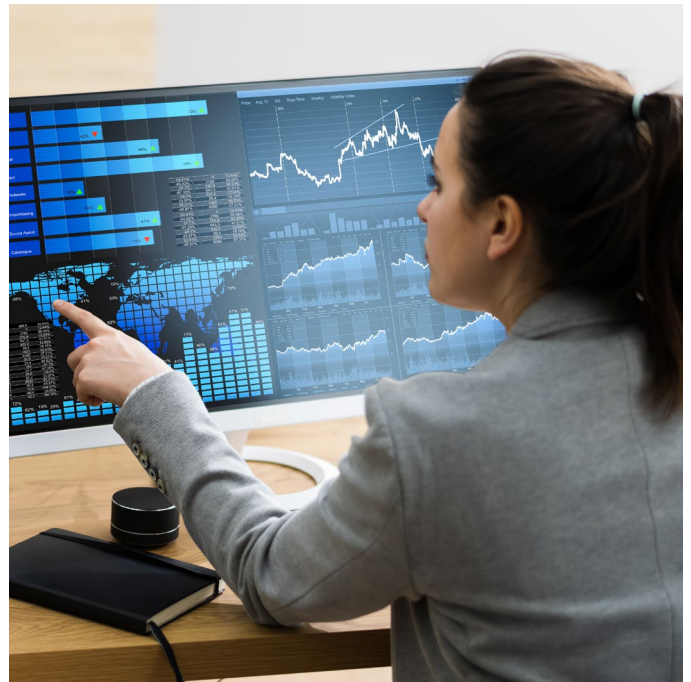
Amperity &

About Amperity

Amperity is the leading Enterprise CDP trusted by the world's most loved brands to accelerate their shift to first-party customer relationships. Amperity has revolutionized the way brands identify, understand, and connect with their customers by leveraging AI to deliver a comprehensive and actionable Customer 360. This unified view improves marketing performance,fuels accurate customer insights, and enables world-class, real-time customer experiences.

About BECU:

BECU is a credit union originally established in 1935 to serve the employees of The Boeing Company. The company is committed to improving the financial wellbeing of its members and communities and to creating financial products and services that make a difference.

Microsoft Azure