

## Case Study: Financial Partners Credit Union (formerly Rockwell Federal Credit Union)



FPCU Home Page

### The Opportunity

Rockwell Federal Credit Union recently changed its name to Financial Partners Credit Union. With more than \$500 million in assets and 62,000 members, the strategic name change would require a complete redesign of the company's existing website to reflect the newly developed brand and logo, as well as an online strategy to bond and strengthen existing member relationships and facilitate membership growth via a strong web presence.

By providing a safe place to invest, serving as a trusted source of financial information, and remaining the best place to turn to for financing, the credit union has a proud heritage of helping members achieve their financial goals. Since its establishment in 1937, the credit union has had a tradition of serving the aerospace industry—courting a field of membership that is among the nation's intellectual elite. But as the aerospace industry changed, members and sponsor companies began diversifying into many different industries, focused largely in the technology sector. By the year 2000, it became readily apparent that the credit union's talented members were now spread across a myriad of leading technology companies, and living all over Southern California. The name change was a necessity and part of a strategic plan to lead the organization into a new decade.

### Requirements Summary

With all eyes waiting and watching, the newly redesigned credit union website needed to be launched quickly and reflect the leadership position, financial strength and stability of the credit union—factors which have fueled membership growth over the last decade. The requirements included creating a new website design to reflect the new Financial Partners look & feel (recently set forth by an independent design team) and developing a professional, visually appealing and easy-to-use interface. Additional challenges were to incorporate and align brand traits, mission, vision and values, adapt existing content to the new interface by identifying "candidate" content for dynamic functionality to simplify navigation, condense content and allow Financial Partners staff administrators to maintain and update website content. Beyond these requirements, specific website enhancements were needed that offered true value to members. For example, faster service response times could be achieved via more sophisticated web operations. The credit union needed to take their website operations to the next level and turned to Imagine IT for advanced web development services and turnkey eBusiness solutions.

### Solution Summary

Creating the new website design required reworking the existing user interface and navigational structure, standardizing page layouts and setting forth a common header and footer concept to facilitate highly efficient site maintenance and improve overall website quality (i.e., provide logical navigation on inside pages and allow users to quickly locate desired information).

The new Home Page provided not only brand recognition, but instant organization and scalability for website content, as well as quick access to all areas of the website. Key inside pages were redesigned which would also serve as templates for creating other new pages to be added, ensuring a consistent

format throughout the website. Developing the navigational structure, header, footer & interface elements also required identifying, reorganizing and fixing missing submenu items, broken links and non-working page returns (i.e., browser back button functionality) throughout entire website to improve overall quality.

With the website design and navigational structure in place, login procedures were created and secure transfer of sensitive customer information for eBanking and Account Access was enabled by creating a secure online interface with the membership database. Web databases were created and existing content was imported and adapted to the new interface. The credit union product line was analyzed and organized for proper presentation. The sales aspect for each product was identified in order to properly position links to "request more info" and make applications readily available and place them in a consistent location for visitors and prospects. Content requiring frequent updates, such as rates on credit union savings accounts, certificates of deposits, IRAs and rates for auto, personal and real estate loans, were imported into web databases to facilitate efficient site maintenance (i.e., allow data entry personnel to easily and instantly update rates on the website via secure online administration whenever rate changes occur).

Faster service response times were achieved by creating sophisticated, yet simple-to-use forms to make it easy / attractive to prospects to apply online for credit union membership, as well as loan, credit card and insurance products and eBanking services. Online applications are transmitted instantly to the credit union where backoffice users such as credit union loan reviewers can closely monitor, review, identify and process new leads and loan requests.

High value web enhancements followed, including **automated workflow management tools** that make it easy to track, manage and respond to incoming member inquiries and information requests "live" on the website. **Activity tracking** to monitor product page popularity was implemented by inserting tracking points and creating custom activity tracking reports accessible to designated internal staff via the online backoffice. **Dynamic publishing tools** for news and events were implemented, allowing credit union staff / administrators to maintain the very latest information on the website via efficient, user-friendly, backoffice maintenance forms. For example, the Events Manager manages all types of credit union events via a master calendar of events (i.e., Home Buying Seminars, Financial Planning Education Seminars, etc.) vs. separate pages with event listings.

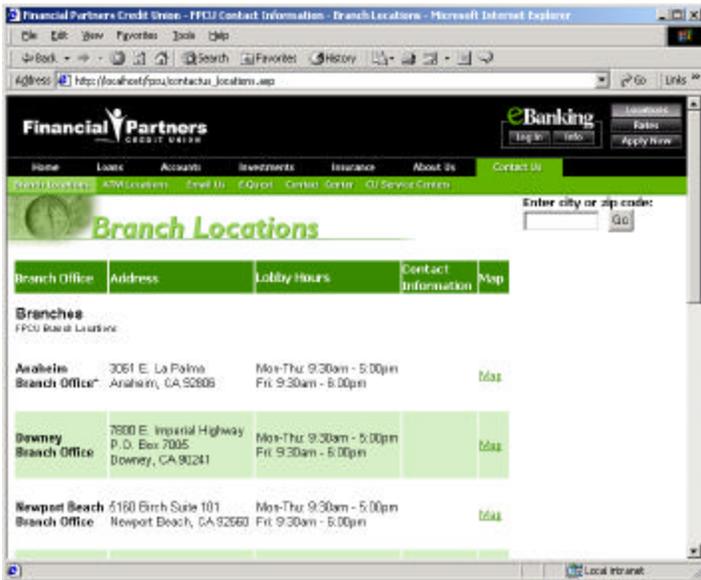
On the front-end, an easy to use city and zip code search was developed to help members quickly locate credit union service centers, ATMs and neighborhood branches. An extensive list of enhancements initiated for Phase II includes mailing lists/enabling email marketing campaigns, co-branded credit union sponsor sites (to be implementing using Imagine IT's LiveWeb™ eCommerce Multi-level marketing solution), credit union service organization site integration, an employment opportunities database and online job search engine, additional online request forms, online availability and maintenance of real estate loan documents, Educational Seminars database to better manage educational opportunities, online membership surveys and working with the credit union IT Department to implement a variety of internal web operations initiatives.

The new site offers Financial Partners Credit Union important new features including secure account information, streamlined content management, and a flexible application with which the credit union can expand its online vision for member service and support.

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**Financial Partners Credit Union (formerly Rockwell Federal Credit Union)** – Internet and corporate Intranet design and development, including front-end and back-end applications, sophisticated main and sub-menu navigation, web authoring and programming, graphic editing/production, proofreading, testing and quality control. Systems analysis and design, and programming services for a variety of other operations-related projects, including Investment Analysis, ATM Tracking, Survey Analysis/Reporting, HMDA Reporting, Dormant Account Tracking, and Y2K initiatives. For more information, please visit <http://www.fpcu.org>.

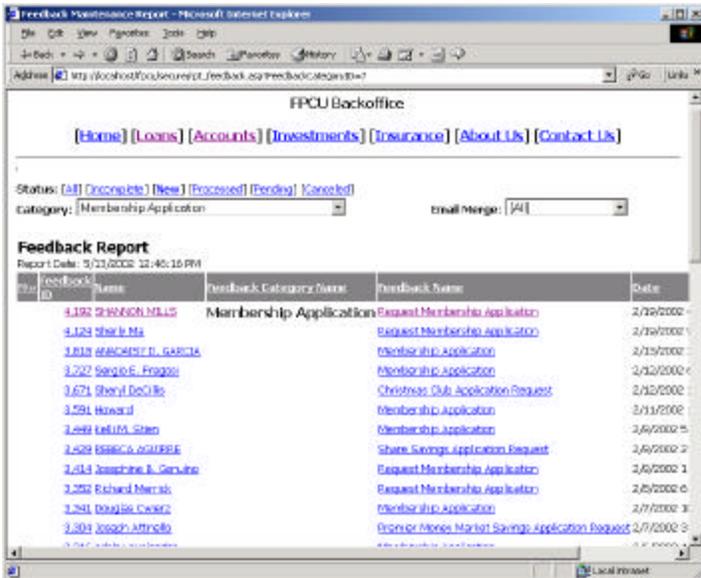
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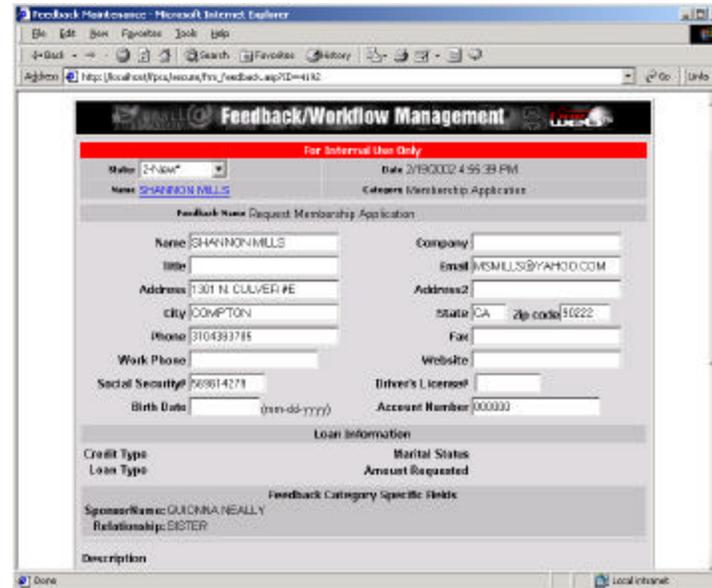
Application: Financial Partners Credit Union Website  
Section: Branch Locations Search (dynamic report)



Application: Financial Partners Credit Union Website  
Section: Accounts Section – Savings & Money Market



Application: Financial Partners Credit Union Website  
Section: Feedback/Workflow Management Report



Application: Financial Partners Credit Union Website  
Section: Feedback/Workflow Management Item / Form