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CU-Force is a NextGen customer relationship management (CRM) platform designed specifically for credit unions.

*It is not a one size fits all application”*



**SEG Portfolio Management:** CU-Force allows credit unions to manage their Select Employee Group (SEG) portfolio efficiently. This means they can handle and nurture their relationships with various employer groups they serve.

**Access Control:** The platform provides access control mechanisms to ensure that only authorized individuals within the credit union can access specific data, even across multiple branches, locations, and departments.

**Segment Targeting:** CU-Force offers the ability to target specific SEG member segments. This is essential for tailoring marketing efforts and services to the unique needs of different groups of credit union members.

**Account Creation:** Credit unions can easily create and manage SEG’s through the platform. This streamlines the onboarding process and improves SEG member experience.

**Marketing Campaigns:** CU-Force allows credit unions to run powerful marketing campaigns across various channels, including email and social media. This helps credit unions engage with their SEG’s and promote their services effectively.

**Clientele List by Segment:** The platform enables credit unions to create and maintain clientele lists categorized by segments. This helps credit unions better understand their member demographics and preferences.

**Data Matching:** CU-Force offers data matching capabilities, which can be valuable for data accuracy and analytics purposes. It ensures that SEG company data is consistent and up-to-date.

**Convenient Access:** CU-Force provides remote access, allowing credit union staff to access the platform from anywhere. This ensures that important information is readily available even when employees are on the go.

In summary, CU-Force is a comprehensive CRM solution tailored to the specific needs of credit unions. It offers tools and features that help credit unions manage their SEG member relationships, streamline operations, and execute targeted marketing efforts. The platform's emphasis on access control and data management also aligns with the security and compliance requirements of financial institutions.



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## Benefits of CU-Force as a cost-effective, easy-to-install, and user-friendly CRM application.

These benefits highlight the convenience and cost savings that CU-Force offers for credit unions looking for an efficient cost-effective CRM solution.

Cost-Effective: CU-Force is cost-effective because it doesn't require expensive on-premise CRM servers, full-time IT specialists, or ongoing maintenance costs. All these expenses are included in the subscription fees.

Easy & Trouble-Free Installation: The sign-up process for CU-Force is straightforward, similar to typical online registration. Additionally, the system offers assistance in migrating existing data into the CU-Force database. Personalized training sessions are also available to quickly familiarize your team with the platform.

Ease of Use & Collaboration: CU-Force provides visual and intuitive dashboards, making it user-friendly. Since it operates in the cloud, it offers the advantage of real-time access and updates from anywhere, enabling seamless collaboration among remote or geographically dispersed teams.

Simplicity and Focus: Unlike many CRM products that are highly customizable and feature-rich, CU-Force is designed to provide credit unions with only the features they need for their business development requirements. This means no unnecessary "bloat" or features that go unused. This simplifies the CRM experience and reduces complexity.

No Need for Extensive Customization: Many CRM systems require significant time and resources to customize them to meet specific business needs. CU-Force aims to minimize the need for extensive customization by providing a solution that is tailored to the requirements of credit unions from the start.

Regular Updates and Enhancements: CU-Force is committed to continuous improvement. It's regularly updated and enhanced to meet evolving needs and industry standards. Importantly, these enhancements are driven by customer feedback, ensuring that the CRM remains aligned with the actual needs of its users.

### Bottom Line

Overall, CU-Force positions itself as a streamlined and customer-centric CRM solution that simplifies CRM management and provides relevant features without the need for extensive customization. This can be particularly beneficial for credit unions seeking a more straightforward and efficient CRM solution. There are no hidden charges. Best of all, no IT involvement is needed to maintain the program.



For more information or to arrange to schedule a demonstration, contact us at 213-358-2809 or email us at [sales@cu-force.com](mailto:sales@cu-force.com).