

CLIENT SUCCESS STORY:

Unitus Community Credit Union

6

Virtual Staff
Training Courses
Developed

1. Tools and resources for Non-Spanish Speaking employees
2. IRS W8-BEN Form Facts & Instructions
3. Identification Job Aid and Foreign IDs
4. Tax ID Discrepancy
5. Immigration Basics
6. The Latino Market and Cultural Themes

17

Bilingual
Employees
Hired

204%

New
Product
Growth

397%

ITIN
Membership
Growth

+1,000

Spanish
Membership
Website Views

Results from 2019-2020

Coopera is proud to have partnered with Unitus Community Credit Union to create a holistic strategy to serve the Hispanic community with a culturally relevant membership experience. Together, we were able to dive in to learn about the credit union's operations and create a unique plan for Unitus to meet their goals.

Through a multi-year relationship beginning at the end of 2018, marketing messages, product development and training material aided in the growth of membership and transition of membership recruitment strategy and service.

“Coopera has exceeded our expectations. We were assigned a single point of contact for our partnership, as well as given access to Coopera’s online library where we could learn from other credit unions across the country. We held monthly meetings to talk through and strategize the four P’s (personnel, products, process and promotion). Expectations were exceeded when Coopera met with different departments outside of monthly meetings to address action items that were specialized to each team - lending, mortgage, marketing, training and community development.” - Corlinda Wooden, VP/Chief Retail Officer, Unitus Community Credit Union



How would you characterize your team's growth following implementation of Coopera's recommendations?

Unitus: Our employees have grown in a number of ways ranging from process and procedural to cultural. To aid in this development, we have created and launched six different training e-courses so we could help employees understand some of the fundamentals around processes and procedures needed to best serve our Hispanic market.

As we work to build trust with the Hispanic community, we realized that we needed to have empathy in addition to understanding so that is where the cultural training courses came in. Coopera provided us with great insights as it related to these courses. While we have served this market prior to working with Coopera, it was on a small scale and we knew that we needed to provide the team with more tools in order to provide our Hispanic members with the same legendary service that we have offered our overall membership.

An additional example of growth for the credit union is in the added diversity of the employees. Coopera helped us develop new recruiting practices and in just one year we were able to hire 17 bi-cultural, bi-lingual employees. These new employees have brought on a new vigor to our focus on better serving the Hispanic market.



Do you feel it's important to partner with a company who takes a consultative approach? How has this approach helped in your success?

Unitus: Absolutely - the level of confidence with our employees and our board has grown as they know we are leveraging expertise from a reliable partner. We can see success in this approach by the significant improvement we have seen in our Cultural Assessment Score and our Growth Stage score. For the Cultural Assessment Score, we moved from 66% of where there was a compliance themed culture to 89% where there is an embracement theme culture by the board and employees. In this assessment, we saw improvement in every single area we were rated on. For the Growth Stage score, we moved from 32% to 68% and are seen as emerging and being well on our way to being named as a best practice credit union. To have received this much progress in one year, while newly operating in a pandemic with many distractions, is a very proud moment for our credit union. We greatly appreciate the consultative approach that Coopera provided us in this journey.

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