

# Maps Credit Union Develops Stronger Tracking Standards to Faciliate Member Compliance utilizing Microsoft Dynamics 365 and Ledgeview Partners

Working with Dynamics 365 and Ledgeview, Maps Credit Union Strengthens their Member Services



Maps Credit Union has a specialized team that works exclusively with complex businesses that require tremendous amounts of monitoring and tracking for compliance. Before the team began working with Ledgeview Partners, they were using legacy systems that lacked the sophistication needed for this specific line of business.

Each team member had individual systems to track member notes, changes, and updates. The lack of intuitive, integrated, collaborative tools created inefficiencies. Those inefficiencies were compounded by astounding growth in this line of business.

“As our department continues growing rapidly, and as we started adding functions, we realized we needed more streamlined methods to keep track of notes, communications

with members, and documents,” said Maranda McArthur, CRM Project Team Lead and Assistant Manager of the business unit. “The growing pains of the department triggered us to look for a CRM.”

Other Maps’ subsidiaries had a positive experience with Microsoft Dynamics 365, leading McArthur and her team to lean toward that solution. Employees at the subsidiary companies liked the ability to shape Microsoft Dynamics 365 into “anything they wanted.” Those endorsements put Dynamics 365 into the consideration set, among other vendors.

Maps Credit Union had few basic requirements for a CRM solution: more efficient collaboration, better ways to organize member information and communications, flexibility, and a system to help them meet compliance standards within their industry.



“Since we have a lot of state and federal regulations to follow, we were looking for a CRM system to help us with our compliance in terms of receipt, intake, documentation, and conformance to important deadlines,” McArthur says.

Microsoft Dynamics 365 offered the tracking and adaptability that Maps Credit Union required.

“We didn’t have a tracking system that was conducive to our team’s workflow,” McArthur says. “Now we have a way to make sure our data is current, integrated, and accessible.”

Dynamics 365 now alerts Maps to due dates, notifications about members and employee responsibilities, member reports, and more. McArthur is sure that Microsoft Dynamics 365 will increase the efficiency of her team.

She anticipates user adoption continuing to grow as they work towards meeting their goals of extending their CRM usership almost 5x over its current state. Today, they anticipate growing usership within her team alone, but see potential in cross-departmental CRM usership over time.

"Ledgeview asked a lot of good questions to help understand our industry, making the project more effective. Plus, they adhered to legal standards, contributing to a more effective CRM environment."

- Maranda McArthur, CRM Project Team Lead and Assistant Manager of the business unit at Maps Credit Union

## THE BENEFITS

"The ability to add notes and record activities to our Dynamics records will help with collaboration and improve our member experience," McArthur says. "It will prevent duplicate efforts and create more efficiencies, improving internal and external interactions tremendously."

Ledgeview was a great fit for Maps Credit Union. Since McArthur was familiar with them through one of their subsidiaries, McArthur sought out Ledgeview for this project to take advantage of the company's consultative and experiential approach.

"Ledgeview was phenomenal," McArthur says. "They walked us through every part of our complex needs. They customized Dynamics to fit these needs, plus they provided the training we needed to thrive. It was super helpful, and every person we worked with was fantastic."

Understanding the software was one of the biggest hurdles Maps Credit Union had to overcome, but Ledgeview helped walk the Maps team through every step to reach their goals.

"Ledgeview asked a lot of good questions to help understand our industry, making the project more effective," McArthur says. "Plus, they adhered to legal standards, contributing to a more efficient CRM environment."

User adoption is going easy for Maps Credit Union so far, according to McArthur who says the team appreciates the ease of functionality of the system.

McArthur says because of CRM and Ledgeview Partners, dealing with their complex business members will be much more effective.

"As we gain more experience with an aggregated, comprehensive data system, we look forward to seeing CRM really pay off," McArthur says. "I'd recommend Ledgeview for any organization with complex needs."

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## ABOUT THE COMPANY

Maps Credit Union, an Oregon-based company, does not just focus on money and finances, but, in their own words, "all aspects of life." Since 1935, Maps Credit Union has provided the necessary tools to help change their client's lives. Today, Maps Credit Union offers members access to seminars, one-on-one custom financial solutions, goal planning and monitoring, and a variety of educational newsletters. Maps Credit Union takes their financial services seriously, and believes in the principles of the worldwide credit union movement including serving their communities with charitable giving, volunteerism, sponsorships and more.



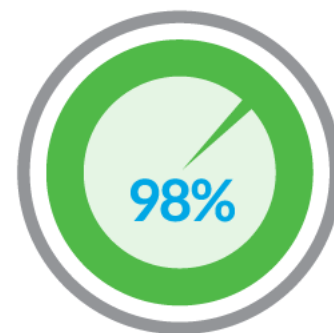


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Ledgeview Partners is a business and technology consulting company who partners with organizations to transform sales, marketing and customer service operations & processes that are supported by core technologies including Customer Relationship Management (CRM) and Marketing Automation.

Ledgeview Partners' consultants combine savvy business intellect with strong technological aptitude to provide solutions that extend well beyond software implementations. It's about building relationships, transforming business, and delivering phenomenal customer experiences.

Ledgeview Partners is a Microsoft Dynamics Gold Partner and a Salesforce Silver Consulting Partner.

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