



Case Study

Organization
Wescom Credit Union

Location
California, United States

Industry
Banking and Financial Services

Building Member Engagement

Founded in 1934 by 13 telephone company employees pooling \$65 each, Wescom Credit Union is one of the largest credit unions in the United States, with assets over \$2 billion and 22 branches in Southern California. The credit union provides a wide range of competitive products and banking services backed by innovative technology that provides anytime/anywhere account access with a high level of service to the retail consumer market.

What did they do?

Wescom doubled its branch network in the early 2000s, working with Esri partner RPM Consulting LLC and using the Esri platform. Adopting Esri® Business Analyst™ allowed Wescom staff to gain new insight from its business data and provide unique and differentiating member services. These included informing members of the nearest no-fee ATMs; understanding usage patterns with branch membership maps; and measuring performance based on member lifestyles and life stage, which were aligned with Esri Tapestry™ segments. Wescom has recently refocused its attention on member engagement and branch optimization, which provides a wider range of interactive and personal banking services while remaining readily accessible to members.

Do I need this?

Esri technology, including location analytics, provides a framework to review different business scenarios and evaluate the benefits to members and the organization itself. Different scenarios can be assessed at the local or corporate level to see how these changes might impact members in any given area and find convenient alternatives to recommend to these members. Mapping and analysis provide a deeper understanding of how different aspects of the business are connected and how changes will influence its members. With better insight, the best service is provided to members at the right time and place.

“Esri technology allows us to better understand and serve the financial needs of our members. Being able to map our membership and visually identify variances based on geographic location and proximity to our branches provides insight that we can use today and often leads us to the inevitable ‘next question.’”

Scott Bytof
Marketing Analyst
Wescom Credit Union



For more information, visit esri.com/banking.

Understanding our world.

Copyright © 2014 Esri. All rights reserved. Esri, the Esri globe logo, Tapestry, Business Analyst, and esri.com are trademarks, service marks, or registered marks of Esri in the United States, the European Community, or certain other jurisdictions. Other companies and products or services mentioned herein may be trademarks, service marks, or registered marks of their respective mark owners.

140685 ESRI2.SC3/14k