



## CASE STUDY

# Fort Financial Credit Union

### Enhancing Member Engagement with Larky's Nudge® Platform

Discover how Fort Financial Credit Union leverages the Larky nudge® platform to strengthen member relationships, increase engagement, and drive growth.

## ABOUT FORT FINANCIAL CREDIT UNION

Fort Financial Credit Union, founded in 1946, is a thriving not-for-profit financial institution that manages over \$330 million in assets. With nine branches located across three states – Indiana, North Carolina, and Mississippi – the credit union serves more than 32,000 members. Fort Financial is committed to differentiating itself through community engagement and embracing digital channels.

## THE CHALLENGE

### SERVE THEIR COMMUNITIES BY DRIVING MEMBER ENGAGEMENT

Fort Financial prioritizes the development of strong, enduring relationships with its members. While branch traffic has decreased over the last few years, due to a variety of factors, credit union leadership put attention, focus and resources to embracing technology and bolstering the credit union's online presence.

To better connect with their members, Fort Financial recognized the need for a more personalized approach that would improve outreach, engagement, and community presence. With members increasingly reliant on mobile devices, the credit union sought a solution that could effectively reach and engage its members.

*“At Fort Financial, we were looking for a unique offering to better serve our members, especially as branch traffic has decreased over the years. While we utilize traditional marketing strategies, we're always looking for an edge as a small marketing team. We were looking for a partner that would enable us to connect with our members where they are, giving us a competitive advantage over other institutions in the region.”*

**Tyler Stevenson, Digital Marketing Specialist at Fort Financial Credit Union.**



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## THE PROJECT

### IMPLEMENTING LARKY'S NUDGE® PLATFORM

After considering various options, Fort Financial Credit Union decided to adopt Larky's nudge® platform, which allows them to send customized push notifications or “nudges” directly to members’ smartphones through their existing mobile app. With no need for members to download any additional software, this seamless integration enabled the credit union to quickly communicate in a new and personalized way with their members, fostering a stronger relationship between the credit union and its members.

*“The integration of Larky into our mobile app was incredibly smooth. With Larky’s seamless support, we were able to implement the solution without needing a dedicated IT resource. Larky has been one of the easiest vendors we’ve ever worked with.”*

**Tyler Stevenson**

Fort Financial used the Larky nudge® platform to create targeted campaigns based on member behaviors and preferences. They’ve leveraged geo-nudges to design very targeted campaigns to stimulate interest in Home Equity Line of Credit (HELOC) loans, mortgages, and personal loans. Additionally, they used Larky to promote community events the credit union was sponsoring or having a presence at, reinforcing Fort Financials’ commitment to the communities they serve. When members tap on the push notifications, they are seamlessly redirected to tailored web pages featuring pertinent and actionable details, further enhancing their engagement and connection with the credit union.

*“One of the outstanding features of the platform is its efficiency and ease of use. In under 5 minutes, I can effortlessly turn an idea into a personalized message that reaches our members’ smartphones and gets results quickly.”*

**Tyler Stevenson**



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## THE RESULTS

### BOOSTING ENGAGEMENT AND TRUST

Since adopting Larky's nudge® platform, Fort Financial Credit Union has experienced significant improvements in member engagement:

- **Over 60 campaigns executed in the last 90 days, resulting in more than 200,000 impressions**
- **Currently running 40 active location-based campaigns delivering targeted, personalized messages**
- **Increased member interaction through personalized nudges and the use of pre-segmented lists for more tailored communication**
- **Diversified marketing approach complementing traditional email marketing**
- **Enhanced product awareness across their member base including a HELOC campaign which achieved an over 30% tap rate**

## NEXT STEPS

### EXPANDING AND REFINING THE USE OF LARKY'S PLATFORM

Fort Financial Credit Union plans to continue leveraging Larky's nudge® platform and explore new ways to engage with their members. The credit union aims to continually strengthen and diversify their marketing strategies, ensuring they remain a trusted resource for their members.

*“The Larky nudge® platform has opened new doors for us to connect with our members, and we're excited to continue using this innovative tool to drive growth and strengthen relationships.”*

*Tyler Stevenson*