



PROFILE

- **Headquarters:** Clarksville, TN
- **Branch locations:** 9
- **Members:** 65,000+
- **Managed assets:** \$900 million



Better Decisions, Faster With MeridianLink One

SEE HOW FORTERA CREDIT UNION INCREASED ENGAGEMENT WITH DIGITALLY INTEGRATED SOLUTIONS

The Challenge: CONVENIENT, ACCESSIBLE FINANCIAL SOLUTIONS

As a not-for-profit financial cooperative, Fortera Credit Union's focus is serving people, with a reputation for finding ways to help members achieve their goals in the face of financial obstacles.

Fortera Credit Union knew that to provide financial solutions that meet their members where they are—and help get them where they want to go—they needed to provide a quicker, more accessible way to address their financial needs. Fortera CU was in search of a partner that could help them maximize internal efficiency and provide a consistent, streamlined experience across the entire financial journey for their members.

“

MeridianLink® One has helped us meet our members' needs by providing them a convenient digital platform to use where we can offer quick resolution and answers to their financial needs. It's helped us work together better as a credit union.

”

—Mary Wood

Director of Consumer Lending,
Fortera Credit Union

The Solution: meridianlink one

Fortera Credit Union leveraged the fully integrated, end-to-end digital platform, MeridianLink One to optimize their loan origination, account opening, and point-of-sale experiences.

WHY FORTERA CREDIT UNION CHOSE MERIDIANLINK ONE



Optimized Products & Performance:

MeridianLink helped Fortera CU consolidate its processes, streamline workflows, automate decisioning, and break down information silos.



Improved Instant Approvals & Cross-Sell:

Fortera CU was able to use their data to optimize their decision engine and implement intelligent cross-sell capabilities.



Advanced Reporting:

Interactive data analytics supported Fortera CU in making faster, data-centric decisions.

The Result:

QUICKER APPLICATION LIFE CYCLE & MORE MEMBER OPPORTUNITIES

With an extremely aggressive timeline to launch all three integrated solutions—MeridianLink® Opening, MeridianLink® Consumer, and MeridianLink® Portal—Fortera Credit Union knew they needed help. The MeridianLink® Consulting team stepped in with Enhanced Implementation, ensuring all areas of lending and account opening were optimized with automation and setup in the most efficient way possible. Fortera CU leveraged the Admin Pro service to tap into the expertise of MeridianLink system administrations, allowing the credit union to focus more time on testing and training.

Partnering with MeridianLink to digitally optimize account opening and loan origination experiences led to **increased digital engagement** from Fortera CU members. MeridianLink Consulting Decision Optimization enabled the credit union to increase origination volumes, better control credit risk, and improve the member experience by defining criteria that served as the foundation for instant decisioning. And by using the built-in cross-sell capabilities, Fortera Credit Union **increased their ability to pre-approve members** for more products, faster, all within one user-friendly application by 15-20%.

Fortera CU also added business intelligence into their processes. Reveal Pro provides improved performance monitoring to further optimize auto decisioning with consistent, data-driven results. While MeridianLink® Insight enables them to apply interactive and analytical reporting to quickly identify areas of opportunity or that need improvement.

The credit union plans to adopt MeridianLink® Mortgage LOS and MeridianLink® Collect in their continued journey to deliver a consistent, seamless digital lending experience.



Let's connect!

Learn how our end-to-end digital lending platform can elevate your origination process and member experience.

REQUEST A DEMO