

# CASE STUDY

Website UI/UX Design, User Experience & Engagement Strategy and Website Development on Sitefinity for Georgia United Credit Union.



**GEORGIAUNITED<sup>®</sup>**  
CREDIT UNION

# 1

## NEW GEORGIA UNITED WEBSITE ELEVATES MEMBERS' DIGITAL EXPERIENCE AND IMPROVES INTERNAL EFFICIENCY

As one of the largest and strongest credit unions in the state, Georgia United Credit Union prides themselves on leading the pack in customer service, interest rates, and premier banking services. Throughout their 60 years serving in the local Georgia community, Georgia United has grown at an exponential rate and was even recognized by Forbes as the Best-In-State Credit Union for the state of Georgia in 2019 and 2020. Their members are at the “center of the universe” and it is a top priority for the credit union to do whatever it takes to ensure member satisfaction and great quality of work.

As Georgia United grew its service area and member-base, they recognized the need for improvements to optimize aspects of their interface in order to give users an enhanced digital experience when interacting with their website. The credit union also experienced internal challenges in content manageability of the website, due to an overcomplicated customized implementation that did not allow the Georgia United marketing team the flexibility or capability to make edits or additions. With our vast experience working in the financial services industry and our partnerships with industry-leading platforms, Georgia United chose SilverTech to help them create a more accessible website for both their members and internal team.

### ADDRESSING ROADBLOCKS

Before the SilverTech team could begin developing a roadmap to digital transformation, we first had to work with Georgia United to find the root cause of their issues, establish ways to solve them, and develop goals they had for their new site. One of the biggest issues in their previous site was the lack of manageability within the CMS platform. Due to an overcomplicated implementation, Georgia United's internal team could not edit or revise any content within their existing CMS without the help of a developer. Issues that would usually take minutes to address, would often take them days to finally solve. This manageability problem delayed member communication and web updates and ultimately slowed down productivity and efficiency within the Georgia United team. Another challenge that Georgia United faced was

a complicated user experience and a less-than-ideal mobile experience for members who visited the site on a phone or tablet. On multiple devices, the website's navigation was very confusing to members searching for specific information, with many page options that made it difficult to find the answers they needed. These navigation issues would lead to many members choosing to leave the site and instead, picking up the phone to call Georgia United directly, rather than providing members the option to get their questions solved in the channel they preferred. The mobile banking capabilities were also lacking, making simple tasks like opening a second account, locating a routing number, and refinancing a loan, very difficult.

With these challenges in mind, SilverTech helped Georgia United establish multiple goals for their new website and developed a roadmap with advanced strategies and tactics to help accomplish them.

### ESTABLISHING GOALS AND DEVELOPING ROADMAPS

SilverTech's strategy team quickly got to work by identifying Georgia United's core audiences, developing detailed personas based off of their members, creating advanced user journey maps, and establishing goals that would be included in their new web plan. Some of the goals identified for the new website were:

- › Enhance navigation & search capabilities
- › Ease internal website management
- › Prioritize the responsive experience
- › Improve overall engagement
- › Understand user interaction
- › Integrate new account opening and mortgage application processes
- › Create a global third-party pop-up across the site for external links

# 2 FINDING THE PERFECT PLATFORM

Once Georgia United and SilverTech established the goals for their new site, it was time to find a CMS platform that could meet the credit union's immediate and future objectives. With Georgia United's previous website, the CMS was developed with little to no manageability capabilities, making it difficult to edit without the help of a developer. With manageability and digital experience goals in mind, SilverTech helped guide Georgia United toward the 12.1 version of the Progress Sitefinity digital experience platform (DXP) because of features such as multi-site, digital insights, personalization and more.

With the help of a Titanium Sitefinity implementation partner like SilverTech, the website can be designed and built with flexibility, scalability, and manageability. The DXP solution is easy to use, extensible, and capable of interfacing with new and emerging technologies.

Sitefinity's Digital Experience Platform also includes dynamic content modules that simplify and promote flexibility in managing the content which is critical to Georgia United. Complete control over templates is another key requirement in reducing the reliance on other internal teams for basic content changes. Finally, Sitefinity provides capabilities such as personalization, advanced insights and marketing features that Georgia United can grow into.



# 3 DESIGN AND DEVELOPMENT

Once strategic plans were approved and the website platform was chosen, the SilverTech designers created wireframes, visual designs, and content elements that would come to life through the programming mastery of the certified development team. While the front-end designers worked hard to establish a more user-friendly and visually appealing website on the members' side, SilverTech's back-end designers implemented and optimized CMS modules to aid in internal manageability.

Together, the development and design teams implemented new interactive tools and helped integrate existing legacy solutions previously utilized by Georgia United.

Members can now have a self-service experience and access the content they need more efficiently with SilverTech's updates and implementations, including:

- › New online application for savings and checking services
- › Improved site search with the new "I want to" feature on the home page
- › New Frequently Asked Questions (FAQ) to help users find answers to their common questions as quickly as possible.
- › Easy accessibility to the Online Banking Login
- › Updated navigation to access Learning Center information

# 4 INTEGRATING NEW FINANCIAL TOOLS AND RESOURCES

In addition to improving user accessibility while navigating the site, SilverTech implemented new interactive financial tools for existing and potential members to compare options and receive more personalized information that fits their exact needs. Georgia United wanted the site to serve as a kind of “online branch” of their credit union, with members getting easy access to their personal information, new account openings and answers to their most important questions.

- › **Financial Calculators** – Displaying rates for users to compare and utilize in their purchasing decisions. For example, the new loan refinancing calculator.
- › **Learning Center** – Potential prospects can access multiple OnDemand webinars and much more with the new improved navigation.
- › **Dedicated Resource Pages** – Helping users find critical information for their banking and lending needs.
- › **Interactive Locations Module** – Creating easy accessibility with new branch location and ATM finder.
- › **CTA Manager** – Driving more conversions with Sticky CTA functionality, a slider callout, standard image callouts, and featured stats callouts.
- › **Web Alerts** – Alerting users at the top of the webpage with important information regarding updated policies, COVID-19 restrictions, and new branch hours.
- › **Georgia United Foundation Site** – Now on the same CMS as the credit union website, this new site provides a better digital experience while maintaining the Georgia United brand standards. Users are now able to donate within the website and find valuable information surrounding the causes that Georgia United cares about.

# 5 SERVICES

- › Website UI/UX Design
- › User Experience & Engagement Strategy
- › Website Development
- › Digital Strategy & Roadmap
- › CMS Implementation & Customization

# 6 RESULTS

51%

Increase in new users to Georgia United Foundation site.

14%

Decrease in bounce rate.

58%

Reduction in # of clicks to complete actions.

52%

Increase in time members engage with page.

100%

Increase in marketing's ability to update the website.



Won Hermes award for gucu.org Learning Center



Won Communicator Award in the Financial Services Category

## Continued partnership with Georgia United.

Georgia United sought a true partnership with great communication between companies with a personal touch that they could not find in larger agencies. Moving forward, Georgia United is looking to work with SilverTech to implement additional integrations with Sitefinity and to begin leveraging Sitefinity's A/B testing, personalization, and digital insight capabilities.

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*Georgia United had a good vision of our goals for the website redesign; however, we were lacking the strategic partner to execute the ideas. Georgia United has high expectations and SilverTech's team listened to what our needs and wants were and were able to bring them to life. The end product is a member-centric website that embodies who we are as a credit union. SilverTech has been professional, comprehensive, and competent throughout the process of our working together and we look forward to a great partnership with ongoing support in the future.*

# 7 THE CREATIVE

## gucu.org

The screenshot displays the Georgia United Credit Union website. At the top, there is a navigation bar with the logo, contact information (Routing Number: 26171309, Phone: 888.693.4328), and links for RATES, LOCATIONS, CONTACT US, and a search icon. Below this is a secondary navigation bar with links for SCHEDULE AN APPOINTMENT, MAKE A PAYMENT, APPLY FOR A LOAN, OPEN AN ACCOUNT, and LOGIN. The main content area features a large banner for mortgage pre-qualification with the text "GET PRE-QUALIFIED & START YOUR HOME BUYING JOURNEY" and an "APPLY TODAY" button. To the right, there is a "REFER A FRIEND" section with the headline "Earn up to \$500\* With our Refer-A-Friend Program" and a "REFER A FRIEND TODAY" button. Below these are "FEATURED RESOURCES" including "IMPORTANT UPDATES" (What to do With Your Economic Impact Payment), "FINANCIAL PREPAREDNESS" (Financial Preparedness), and "Save or Pay Off Debt". A "I WANT TO" dropdown menu is visible at the bottom of the page.

## gucufoundation.org

The screenshot displays the Georgia United Foundation website. The top navigation bar includes the logo, "GUCU.ORG", "FAQS", and a "DONATE" button. The main content area is divided into several sections: "COMMUNITY IMPACT" with a sub-section "Service is built into our culture at Georgia United and our Foundation...", "SERVICE DAYS" with a sub-section "For Team Day 2020 in February, over 370 Georgia United team members selected 25 local 501(c)(3) organizations they wished to serve.", "HEALTHCARE HEROES" with a sub-section "To show appreciation for frontline workers, Georgia United Foundation provided care packages to seven community hospital partners.", and "SCHOOL CRASHERS" with a sub-section "Even with a pandemic and schools temporarily closed across Georgia, the foundation continued to award School Crushers grants." Each section includes a "READ MORE" button and a corresponding image.

