



**Education Credit Union:
Driving New Member Acquisition
and Deeper Relationships
with Vertice AI**

***270% lift in campaign conversion rates
and 8% higher products per member***



VERTICE AI



Education Credit Union is a \$475 million asset credit union headquartered in Amarillo, TX, serving the financial needs of educators and the broader Texas Panhandle community. Known for its commitment to financial literacy and community development, ECU sought an innovative new way to modernize member engagement while maximizing impact with lean marketing resources.



THE PROBLEM

Core challenges for ECU were:

- ECU wanted to modernize how they attract new members and engage existing ones.
- Even with clear goals and strong community insight, running targeted campaigns was difficult.
- They depended on outside vendors for segmentation and execution, which limited flexibility and growth.
- Pulling internal data took time and required other departments, causing delays and slow responses to opportunities.

ECU needed a solution that would:

- **Efficiently** offer deeper insight into both prospective and existing members.
- **Allow** the marketing team to operate with greater speed, precision, and independence.
- **Deliver** value without requiring a team of data scientists.





THE SOLUTION: VERTICE AI

ECU partnered with **Vertice AI** to implement its **CORE** and **ACQUIRE** solution modules, which deliver actionable, member-centric insights that empower ECU to optimize marketing investments, deepen member relationships, and drive measurable growth.

By leveraging Vertice AI, ECU saw many key benefits:



Reduced its dependency on external vendors, gained greater flexibility and scalability across its marketing operations by automating segmentation and member scoring



Launched targeted prospect campaigns through the ACQUIRE module



Built smarter strategies for member relationship expansion



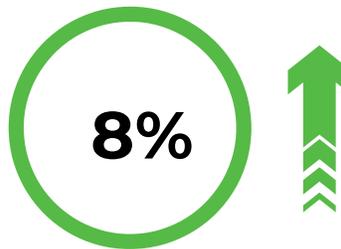
OVERALL VALUE & IMPACT

With **Vertice AI**, ECU's marketing team reached the right people at the right time with the right message. They moved faster, avoided delays, and drove measurable impact without adding complexity.

RESULTS:



Lift in campaign conversion rates compared to the prior year, with nearly 1% average checking account adoption across the targeted campaigns.



More products per member among Vertice identified prospective members, showing deeper relationship potential from day one.



Ad click-through rates and strong cross-sell activity—proving that smarter outreach drives better engagement.

- **\$2M** in new loan balances and **\$250K** in net new deposit growth tied directly to the initial Vertice-powered marketing campaigns.
- Faster, self-serve campaign execution enabled ECU to reduce vendor dependencies and launch smarter campaigns on their own timeline.





CLIENT PERSPECTIVE



“Working with Vertice AI is transforming how we approach marketing. Our team is empowered to build smarter campaigns faster, and the results speak for themselves. It’s exciting to have a partner that not only understands the credit union mission but also gives us the tools to grow in a modern, data-driven way.”

“Looking ahead, we see Vertice as more than just a marketing platform—it’s a strategic, organization-wide solution that is helping us bring data-driven decision-making into every corner of our organization. Vertice is enabling us to align growth strategies with real member needs using the data we already have.”

— **Tiffany Sharpsteen, Vice President of Marketing, Education Credit Union**



CONCLUSION

Education Credit Union’s early wins with **Vertice AI** signal a broader shift toward smarter, more efficient growth—powered by data and delivered with a human touch. What began as a targeted acquisition initiative has grown into a foundational capability that supports strategic growth across marketing, product, and member experience teams.

With Vertice AI, ECU is now equipped to:

- ✓ Launch more high-performing, personalized campaigns in an efficient way
- ✓ Empower teams across the credit union with actionable insights for every member interaction
- ✓ Guide product development based on actual member behavior
- ✓ Deliver the right message, offer, or service at the right time—at scale

Vertice AI isn’t just an analytics tool, it’s an enterprise engine for smarter growth. By turning existing data into meaningful action, ECU is creating a future where every member interaction is relevant, every campaign is targeted, and every product is designed to meet real member needs.