

Trax Credit Union

Increases survey response rate by 415% & saves thousands with digital surveys



Background

Trax Credit Union is committed to member satisfaction and recognizes the value of member feedback. However, collecting feedback via reply-by-mail paper surveys was tedious and unnecessarily expensive. Trax leveraged the Digital Onboarding engagement platform to replace paper surveys with instant online surveys.



Campaign Goals

- Eliminate survey mailing costs
- Save 12 hours of staff time every month
- Boost the new member survey response rate by 20%



Campaign Tactics

Trax leveraged the Digital Onboarding engagement platform to field new member surveys shortly after account opening. Members received an email and text message that linked them to their Digital Onboarding personalized microsites. The Digital Onboarding Survey Widget was embedded into the microsites, enabling instant feedback with little effort. A follow-up email was sent if a member did not complete the survey.



Email & SMS text links



Microsite with embedded Survey Widget

About Trax Credit Union

Established in 1935, Trax Credit Union is a not-for-profit financial cooperative with over \$480 million in assets and nine branches throughout Hillsborough, Polk, and Pasco Counties. Trax is headquartered in Tampa, Florida, and serves over 44,000 members.



Campaign Tactics Visualized

Jane, welcome to Trax Credit Union! We'd love to hear about your account opening experience. This will just take a few minutes and will help us ensure continued quality service:

<http://survey.TraxCU.com>



Dear Jane,

Welcome to your Credit Union! As a new member, your impression of our service is important to me! Please answer just a few questions so I can ensure we're delivering service according to our values.

[SHARE FEEDBACK](#)

Email & SMS text messages



Complete the survey to complete this step.

Your opinion means the world to us, Jane!

How did you complete your membership request?

- ☐ In Person at a Branch
- ☐ At Work/Employer During a Sign-up
- ☐ Online
- ☐ Other

[NEXT](#)



Your opinion means the world to us, Jane!

Please answer the following questions about your recent experience when opening your Trax Credit Union account. Our goal is to provide personal service that aligns with our company values.



Thank you for completing the survey!

Survey Widget



Campaign Results

The transition to online surveys was a roaring success, as **survey response rates increased by 415%** vs. the previous four years of paper surveys. Trax is benefiting from more member feedback while achieving cost savings. **Staff no longer need to spend 12 hours manually aggregating and uploading paper responses every month**, and Trax eliminated the cost of mailing out surveys. **The credit union is saving more than \$4,000 annually in mailing costs.**

“Member feedback is pure gold, and it fuels our innovation efforts! With the Digital Onboarding engagement platform, we more than quadrupled our survey response rate while saving thousands of dollars a year. It’s a no-brainer!”

- Jessica Stevenson
S.V.P Marketing

About Digital Onboarding

The Digital Onboarding engagement platform helps banks and credit unions turn account holders into engaged and profitable relationships. Email and text messages link customers and members to their personalized microsites. Self-service tools help them enroll in direct deposit in seconds, update default payment methods at places like Amazon and Venmo, adopt digital banking, and more.

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