serve7 | **Ebook**
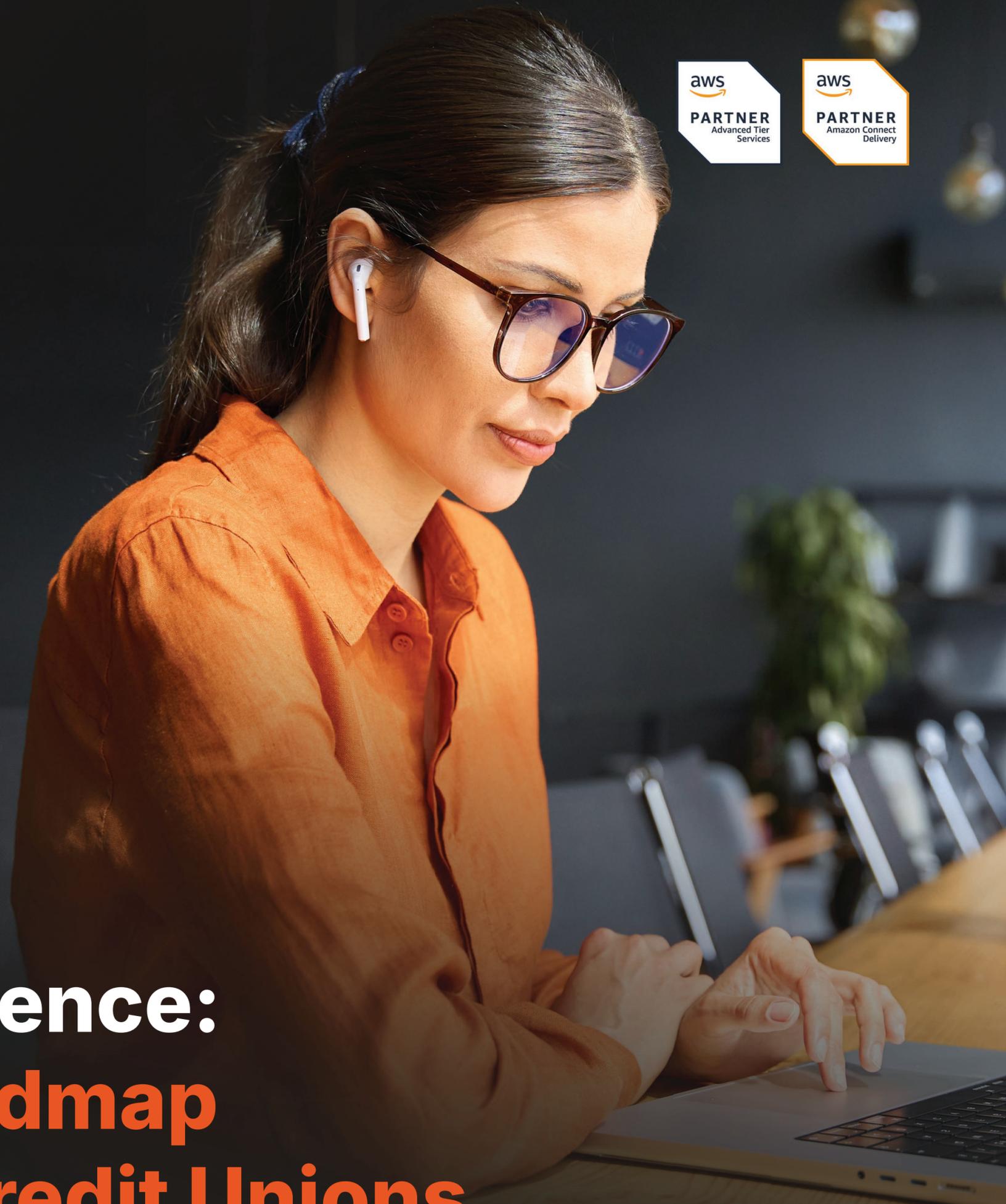
Modernizing Member Experience:
A Practical Roadmap for Canadian Credit Unions

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Executive Introduction

Credit Unions across Canada are facing increasing pressure to modernize their member experience while balancing limited resources, competing priorities, and rising member expectations.

We built this guide to show you:

- How to modernize CX without needing a massive internal project team.
- Where leading Credit Unions are starting today and what's working.
- How to build internal confidence and business case support.

The False Choice:
"All or Nothing"

The #1 roadblock we hear from Credit Unions:
"We know we need to improve CX, but we don't have capacity to replace everything at once."

Good news:
You don't have to!

The fastest-moving Credit Unions are applying
a progressive modernization model, starting with:
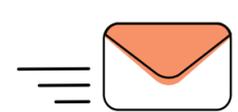
Voice routing simplification	Adding chat or messaging channels incrementally	Automating simple self-service tasks	Proactively notifying members when something important happens

Modernization isn't a rip-and-replace project.
It's a phased expansion.

Immediate Wins
That Don't Overload Your Internal Team

Simplify Member Routing

Improve how voice and digital interactions reach the right team members

Leverage intelligent auto-attendants and natural language understanding.

Reduce friction without adding full automation up front.

Expand Digital Entry Points

Introduce web chat, messaging, and SMS channels.

Support younger members, newcomers, and working families who want flexible engagement options.

Proactive Member Notifications

Outbound alerts for NSF, high deposits, renewals, or service reminders.

Reduce inbound calls while improving member care.

Business Case:
Build Leadership Confidence

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Offering true **"Pay for what you use"** pricing with the ability to scale to meet growing demands of your business. You'll get the benefit of lower capital investment and better adaptation for M&A while scaling up or down as necessary.

Pay for Only What You Use

Traditional Contact Centre License Model

Usage Based Solution with Serve7

Save up to 80%

- **Locked in to mult-year license agreement** based on seasonal high water mark for users

- Difficult to innovate and add new features
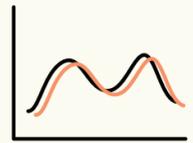
- Pay-as-you-go cloud contact center

- No minimum fees, long-term contracts, or upfront license costs

- Scalable up or down as needed, add features, users, channels, test, innovate & validate business use cases in real-time and with no restrictions

Amazon Connect Benefits

Amazon Connect is the cloud-based contact center solution that can deliver this ideal state, regardless of the number of call center employees.

Here are some examples of its advantages.

Usage-Based Pricing

- Pay-as-you-go cloud contact center
- No minimum fees, long-term contracts, or upfront license costs
- Not charged by peak capacity, agent seats, or maintenance
- Scalable up or down as needed
- Pay only for what you use

Reduce Cost

- Scale up or down with utility (usage-based) pricing
- No minimum spend, long-term contracts, or obligations
- Easily enable features, pay only for what you use
- Save 30–80% compared to traditional contact center solutions
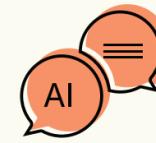
Built in GenAI

- Amazon Connect transforms customer service and relationship building
- Helps build, nurture, and sustain customer relationships
- Uses generative AI to enhance the customer experience
- Turns every interaction into an opportunity for loyalty and satisfaction

A partner to bring it all together

- Validated Experience with decades of CX migration knowledge
- Accelerated Results to save time to adoption
- Cost Optimization to get the most out of the platform

aws PARTNER Amazon Connect Delivery

aws PARTNER Advanced Tier Services

Extending Your
Internal Team

We know many Credit Unions don't have large IT or Contact Centre teams to drive these changes internally.

That's why Serve7 exists!

As an AWS Advanced Tier Partner, we bring:

- Expertise with Canadian Financial Institutions
- AWS-native expertise
- A prescriptive, proven framework that accelerates your first deployment
- A fully managed engagement that minimizes internal burden

Serve7 as Your Partner in Contact Centre Innovation

"Do you have the resources for a Cloud Contact Centre Migration?" is the first quetsion we usually ask anyone interested in modernizing. The answer is often "No" and that's ok! Contact Centre migrations are very specialized, and most organizations migrate only once every 10-15 years. We'll collaborate with your internal teams and departments and fill any gaps necessary to ensure acceleration and cost efficiency.

Serve7 is a Service Delivery Partner for Amazon Connect, that means we've undergone specific, rigorous training and have validated experience in order to deliver professional contact centre migrations. Here's how Serve7 helps deliver value:

Validated Experience

Serve7 is a validated Amazon Connect Partner with deep technical expertise, proven methodologies, and a strong track record of successful implementations. We design and optimize contact center workflows, ensuring compliance with industry standards such as HIPAA and PCI while addressing the unique needs of various industries.

Cost Optimization

We design cost-efficient architectures, optimize AWS pricing models, and provide tools and processes for ongoing cost management, ensuring long-term savings and financial efficiency.

Accelerated Results

We build specialized features, integrate generative AI capabilities, and tailor interfaces to meet your specific requirements. Our team develops customized reports and analytics, maps customer journeys, and designs self-service experiences with automated workflows.

Modernize & Optimize

From pre-launch consultation to implementation, phased rollouts, and continuous optimization, Serve7 provides full lifecycle support for your contact center. With quarterly feature reviews and annual business reviews, we ensure that you're getting the most efficient and productive use of Amazon Connect

Your Next Step:
The CX Assessment

The Serve7 **Free CX Assessment** Includes:

- A personalized discovery session with your team
- A current state environment review
- Prioritization of modernization opportunities
- A CX Assessment Report you can present to leadership

Book Your Free CX Assessment

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Helping Credit Unions modernize with confidence – while protecting what makes you unique.