

ClickSWITCH is a turn-key solution that simplifies and automates the switch of direct deposits and recurring payments for credit unions' new and existing account holders, boosting member engagement with the credit union.

THE SITUATION

Becoming our members' primary financial institution many times requires a member switching from an account held elsewhere. Your credit union can quickly be the institution of choice by solving the complex problem of switching account holders' direct deposits and recurring payments to their credit union accounts.

THE SOLUTION

ClickSWITCH handles switching automated debits and credits for new and existing members. It will even close the legacy account for your member. ClickSWITCH makes it easy to improve engagement from your account holders and drive more deposit growth for your financial institution.

The Benefits



Full engagement

Convert your account holders into fully engaged members by helping them move their direct deposit and recurring payments.



Increased loyalty

Increase the likelihood of becoming your members' primary financial institution.



Greater revenue

Drive more deposit growth and increase profitability of new checking account members.



Largest database of employers

Change direct deposit for employers ranging from the largest traditional employers to the small local business down the street.

CREDIT UNION EXPERIENCE

Staff assists a member in the branch during the original onboarding process by following these steps:

- After a member has opened a new checking account through your account opening process, your staff member will enroll this new member in ClickSWITCH by logging in to your credit union's ClickSWITCH admin portal.
- Once the member is enrolled, ClickSWITCH generates a SwitchTRACK code (an activation code) that uniquely ties the member to the switch process.
- While the member is still in the branch, your credit union staff can begin to capture the member's account information (i.e. direct deposit, recurring payments) within the admin portal.

MEMBER EXPERIENCE

After the member leaves your branch after opening an account, they will be directed to a URL specifically set up for your credit union, and they will be able to use the activation code provided to create their own password for their ClickSWITCH portal.

- Click the link in the welcome email provided by the account representative.
- Enter the SwitchTRACK code and create an account to access the ClickSWITCH portal
- Easily view and create new direct-deposit, automatic-payment, and account-closure switches on their own over the next 90 days.

KEY FEATURES

Automated debits and credits

Conveniently and securely switches automated debits and credits, including direct deposits and government payments.

Payee notifications

Provides auto-debit payee notification of new account information and accurate update of billing information (such as utilities, insurance, club memberships, etc.).

Real-time confirmations and balance assist

Real-time switch status includes confirmations of when payments have been successfully switched, and balance assist offers recommended dollar amounts to leave in former accounts until they can be closed.

Straight out of the box

Easy to integrate and get members' accounts switched over quickly.