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Project Report

Enhancing MEMBERS Financial Network

Project Sponsor

CUNA Mutual

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EXECUTIVE SUMMARY

CUNA Mutual Group is a mutual insurance company that provides a variety of financial products and services to credit unions and their members, including insurance, asset management, and business process outsourcing. Though traditionally a business-to-business service provider (with indirect consumer access), the company is working towards developing their brand in the direct, business-to-consumer space.

The objective of this project was to assist CUNA Mutual in enhancing the MEMBERS Financial Network (MFN) website by performing a competitive analysis and usability evaluation of the website. Other factors that were considered and analyzed include business-to-consumer lead generation, use of social media by similar institutions, aggregation solutions and best-of-breed mobile websites and applications.

MFN is a hosted website provided by CUNA Mutual Group that serves as an online channel for their associated credit unions. The site offers access to information, products and services related to insurance and investments, and intends to be the place for credit union members to manage their entire personal financial life. Closely related to MFN is the MEMBERS Product Website, or MPW, that offers information on CUNA's products with the purpose of getting potential customers to speak with an advisor. Though the report focuses on MFN, our project findings suggest that CUNA unify these two websites as they have partially overlapping audiences and aspirations.

The result of our work is a set of recommendations that we hope will help CUNA Mutual Group build and enhance the replacement for MFN and MPW so that they are built with usability, modern design, and consumer relevance in mind. Broadly, this includes re-framing direct vs. in-direct competitors, developing a consistent brand image, refining the layout and organization of included content, and integrating practices from best-of-breed example sites across all areas of this project's focus.

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