

Membership Organization

Introduction

This case study of a membership organization is based on a February 2021 survey of GreenPath Financial Wellness customers by TechValidate, a 3rd-party research service. The profiled organization asked to have their name blinded to protect their confidentiality.



“Help our members afford their monthly payments and avoid delinquency or even worse charge off.”

Challenges

The business challenges that led the profiled organization to evaluate and ultimately select GreenPath Financial Wellness:

- Why they partnered with GreenPath:
 - Members/customers were struggling with their finances
 - Out of a desire to support/provide financial literacy resources to the community

Use Case

The key features and functionalities of GreenPath Financial Wellness that the surveyed organization uses:

- Using the GreenPath Financial Wellness Program in the following areas:
 - Collections
- GreenPath offerings/capabilities:
 - Financial Counseling: Very Important
 - Debt Management Plan (DMP): Very Important
 - Partner Center Access (Marketing Materials): Very Important
 - Educational Resources such as CheckRight, Worksheets, on-line courses, PowerPoint Presentations, Workshops, etc.: Very Important
 - Staff Resources – Staff Training, Toolkits, Job-Aids: Very Important

Results

The surveyed organization achieved the following results with GreenPath Financial Wellness:

- After partnering with GreenPath, they saw a positive impact within 7-12 months on members/customers and their financial institution.
- Partnering with GreenPath Financial Wellness, they have enhanced their ability to:
 - Support members/customers in reaching financial goals
 - Develop stronger relationships with members/customers and improve member/customer satisfaction
 - Improve collection results
- Level of agreement with the following:
 - GreenPath offers exceptional partner support: strongly agree
 - GreenPath offers an outstanding member/customer experience: strongly agree
 - partnering with GreenPath has improved their financial institution's performance: strongly agree
 - partnering with GreenPath has improved staff engagement: strongly agree
 - GreenPath is genuinely concerned about the well-being of their members/customers: strongly agree
- Benefits their members/customers have experienced since partnering with GreenPath:
 - Reduced financial stress
 - Increased savings
- How they would describe their GreenPath partnership?
 - Reliable
 - Good value for the investment

Organization Profile

The organization featured in this case study asked to have its name publicly blinded because publicly endorsing vendors is against their policies.

TechValidate stands behind the authenticity of this data.

Industry:
Membership Organization

About GreenPath Financial Wellness

GreenPath Financial Wellness is a national nonprofit that believes that financial health is a path to achieving dreams. It means having stability and freedom. Having options and being able to work toward your goals. Maybe that's a bigger home. Or a different job. Or a better school for your kids. It's different for each of us, but taking control of day-to-day financial choices is the foundation for creating more opportunities. Because our dreams are that much closer when we're financially healthy.

Learn More:

[GreenPath Financial Wellness](#)