

Spend Time With Members, Not Systems.

In most credit unions today, systems, workflows, and channels operate independently. Savana brings these capabilities together into one experience:



Unified Banker Desktop

Relationship, servicing, and onboarding in one place



360° Relationship Views

Real-time visibility across retail and commercial relationships



Workflow & Automation

Guided servicing and exception handling

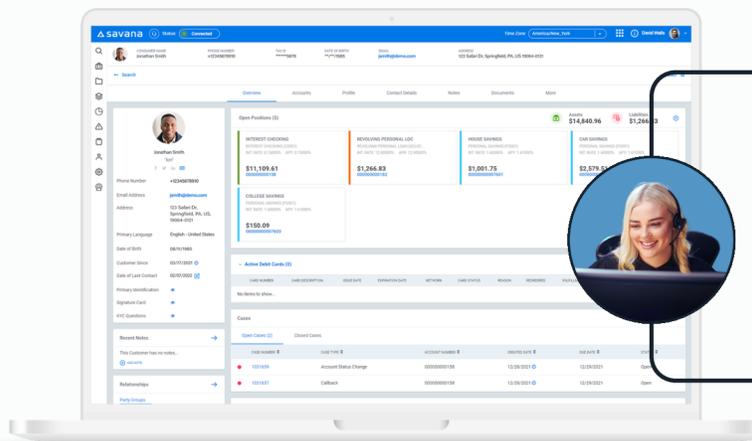


Real-Time Integration

Live connections to cores and third-party systems

Banker Experience at a Glance

From relationship view to task completion, work executes across systems without leaving the desktop.



Banker Experience Desktop

Customer Task List

- Add Alert
- Add Customer Card
- Add Customer Document
- Add Customer Service Case
- Change Address



Change Initiated



Updating Cores



Change Complete

Account Origination

- Select Products
- Capture / Validate Customer Data
- Verify KYC / KYB
- Review Disclosures



Running Approvals



Funding Account



Booked to Core

Built for the Way Your Credit Union Operates

Savana Banker Experience delivers centralized CRM, servicing, communications, and integration capabilities that operate across your credit union's assisted and digital channels.

CRM & Relationship Management

A single source of retail and commercial relationship context with real-time visibility across all interactions, servicing, and channels.

Servicing & Operations

End-to-end servicing and exception workflows with orchestration, guardrails, traceability, and clear ownership across teams.

Communications & Documentation

Automated notifications and preference-based delivery of statements, forms, and servicing documents, with audit-ready records of related activity.

Core & Third-Party Integration

Real-time integration with core banking systems and third-party services across payments, cards, ACH, wires, identity, and KYC/KYB.

Who is Banker Experience is For?

One experience across every team for your institution.



Branch

Relationship management and servicing in one experience



Contact Center

Faster resolution with full member context.



Back Office

Exception handling and cross-team workflow visibility



Assisted Account Opening

Start or continue complex applications across channels without rework

