SugarAI

5 ways credit unions and community banks grow with SugarAI

SugarAI helps build stronger member relationships and deliver tailored service from one central system. The result is lasting growth built on trust, efficiency, and smarter decisions – empowering credit unions and community banks to compete while staying compliant.



How to drive member growth and loyalty with precision



1 Support the full member profile

See multiple member profiles in one place – whether a personal or business account – from loan details to service requests. With the full picture, customer reps can save time, stay compliant, and give members the **trustworthy, reliable service they expect**.

2 Surface actionable insights

Identify new ways to serve members – through referrals, additional accounts, and expanded services. SugarAI gives your team the insight to support each step of a member's financial journey and **build lasting growth**.

3 Elevate member service

Provide personalized and consistent member experiences across every team. SugarAI helps staff collaborate, and helps leaders track KPIs and develop executive reporting to **measure and improve performance**.

Learn more. Visit sugarai.com

4 Automate everyday operations

Automate routine processes like onboarding, loan servicing, and compliance tasks. SugarAI integrates with core financial and loan systems to reduce errors, save staff time, and **keep operations smooth and audit-ready**.

5 Maintain security and compliance

Ensure that personal information, and regulatory requirements are stored and processed securely allowing you to **drive operations effectively and compliantly**.

> **"Sugar helps us approach every customer interaction with knowledge and confidence."**

MAUREEN FLAHERTY
Chief Marketing and Customer Experience Officer, Kennebunk Savings

SugarAI

Unlock sales potential

About SugarAI

SugarAI goes beyond traditional CRM to power account-first, AI-driven selling. Our Precision Selling platform helps sellers win and grow the accounts that matter most by uncovering hidden risk, revealing expansion opportunities, and guiding every next move for complex, relationship-driven businesses.

Learn more at www.sugarai.com