

Customer Success Story

MAX Credit Union Leans on Intuitive TEK to Get the Most out of Adaptive Insights



Max Credit Union is a full-service financial institution committed to making money management easier, smarter, and more affordable for residents and businesses. It offers a full range of financial services to help customers achieve financial success: mortgages, loans (car, home equity, business, construction), credit cards, checking accounts, IRAs, insurance and more. Max pays dividends on checking accounts and offers competitive rates on savings, making banking at Max highly beneficial.



When pressing finance questions arise in Adaptive Insights, Intuitive TEK's speedy support keeps Max Credit Union in the know.

Now more than ever, financial institutions need to quickly assess trends, cut down on research time and easily access reports to achieve business success. And that's exactly what Adaptive Insights delivers to Max Credit Union. Max Senior Vice President and Chief Financial Officer Tim Marquardt especially likes the report functionality: "Ease-in-reporting to both management and the board is a big time-saver."

Max also uses Adaptive Insights to forecast and create budgets. Marquardt explains that Max uses the system to "get a general update on a rolling forecast, start next year's budget process and start the research for expense transactions."

But finance planning and analysis wasn't always that slick at MAX. Marquardt remembers what life was like before Adaptive Insights in 2012: "I quickly assessed that the prior system was cumbersome for both reporting and research, and that the budgeting system was basically non-existent."

Fortunately, those woes disappeared with Intuitive TEK's skillful set up of Adaptive Insights. And it didn't stop there. Intuitive TEK has continued to champion all things Adaptive Insights for Max—from training and support to advice and contract renewals. When questions arise, Intuitive TEK is always at the ready with expert knowledge. In keeping with Marquardt's preference for time-savers, he sums up what he likes best about working with Intuitive TEK: "Quick turnaround for questions."

Adaptive Insights' superior planning, budgeting and forecasting solution coupled with Intuitive TEK's outstanding (and quick) support is a winning combination for Max.