



## CASE STUDY

### CREDIT UNION CONTACT CENTER

### Client Challenges



High Abandonment Rates



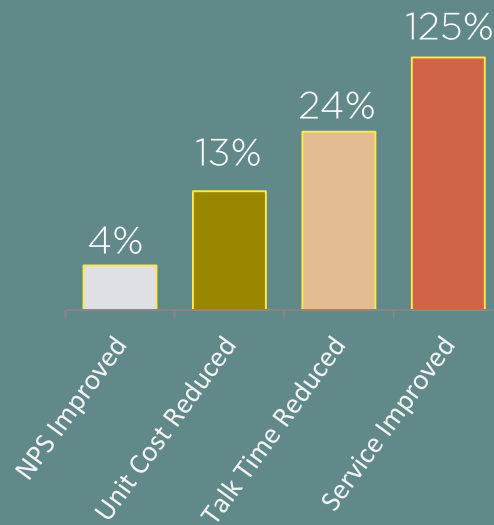
Low Service Levels



Member Frustration

### Results

We offer a guaranteed 2:1 ROI.  
*If we don't deliver, we don't get paid. It's that simple.*



### Solution Overview

Marathon Partners began by conducting a two-week analysis of the Member Service Center (MSC). From this we identified four key issues: lack of agent development and coaching, no agent training or career path, limited call center foundations and call handling inefficiency. MSC leaders agreed with the findings. We then developed a project proposal, solution roadmap, benefit summary and guaranteed 2:1 ROI. The CEO liked what he saw and moved forward with the project. Over the next three months we improved several key areas of the operation, while exceeding the ROI.

### Key Elements of Solution

- Implemented 59 process opportunities
- Redesigned IVR to simplify choices, eliminate under utilized prompts and match callers to the best skilled agent
- Created training aids for agents ranging from call control to customer verification to use of hold and the internal helpline
- Provided training on Verint WFM and optimized agent schedules
- Implemented System for Managing with daily huddles, manager on duty schedule and performance review meetings
- Eliminated reliance on third-party call support saving \$200K annually
- Deployed ASCEND™ Analytics, Coaching and Quality Solutions
- Enabled data integration for ACD stats, adherence, NPS, cross sells, referrals and quality, thus providing staff with next-day on-demand performance reports for the first time ever
- Developed three-year strategic roadmap for the MSC
- Provided free-of-charge support for two months post project to ensure all disciplines and process changes were firmly established

*Within one month of project completion, the call center delivered its highest service level and lowest cost per call in 2+ years.*