






CASE STUDY

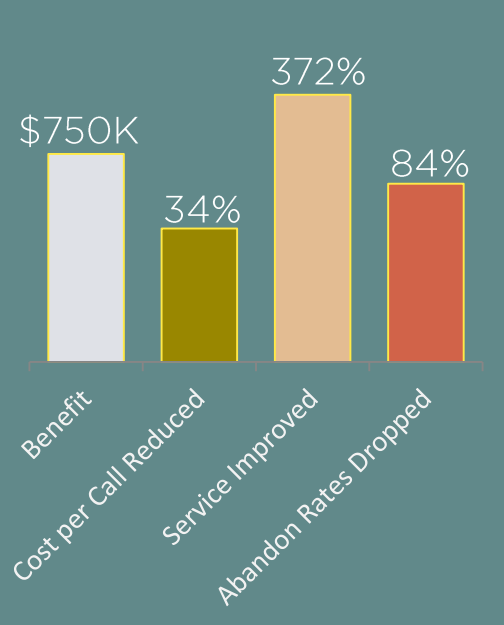
CREDIT UNION CALL CENTER AND LENDING

Client Challenges

-  Poor Abandonment Rates and Service Levels
-  Inefficient Lending Processes and Little Performance Insight
-  Declining NPS and Lack of Quality/Performance Mgmt

Results

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



Solution Overview

We followed our trusted approach by first conducting a free-of-charge two-week Analysis to understand the needs of the contact center and lending teams. From this we developed a business case and implementation plan that guaranteed a minimum ROI of 2:1. Our first order of business was to get the contact center service levels and abandon rates to world-class levels. In lending the aim was to design and implement more efficient processes. In both regards the project delivered in spades. Additionally, we implemented performance management, workforce management and employee coaching software and solutions.

Key Elements of Solution

- Redesigned IVR to reduce member frustration and improve call routing
- Enhanced call segmentation to better align skill with call complexity
- Conducted agent training around member verification and call documentation to promote compliance and call handling efficiency
- Improved use of Interactive Intelligence by implementing auto-answer, enabling agent greeting, reducing number of agent states and refining wrap codes used
- Implemented daily stand up huddles and trained leaders to use meeting to review net staffing lines and the day's plan
- Created process where branches support call center in high volume periods, thus minimizing impact to service and NPS
- Reduced reliance on third-party call support partner by 94%, saving the business nearly \$250,000 annually and improving member experiences
- Designed 17 future-state processes in lending department (e.g. disputes, lending visa, lending auto, fraud, payment and modifications)
- Developed activity-based resource models for all teams in scope
- Deployed ASCEND Performance Management and Coaching Module
- Provided staff with daily feedback on individual and center performance; prior to project staff received feedback weekly/monthly

When the Chief Retail Officer presented the results to the Board, several members stood and clapped. This is exactly the response you want from your Board when they approve an off-budget project!