



FINANCE INDUSTRY

Credit Union gains control, security, and compliance



Overview

This case study demonstrates how a regional financial institution, referred to here as "The Credit Union", rapidly replaced its deprecated contact center system under regulatory pressure, prioritizing security, operational control, and an enhanced customer experience.

The Credit Union serves as the first line of customer support for its members in the finance industry. The contact center handles high-volume, sensitive inquiries crucial to daily banking, including account inquiries, password resets, membership questions, account transfers, and transaction inquiries. While providing this front-line support, agents are also responsible for securely and seamlessly transferring customers to specialized internal teams for complex product inquiries, such as those related to home loans or credit cards.

Challenges

The Credit Union faced a critical, time-sensitive mandate driven by a few major factors:

- **Regulatory Deadline:** Their existing Avaya solution was being deprecated, and their regulatory board required the solution to be decommissioned within 6 months. This imposed a strict and non-negotiable deadline.
- **Operational Constraints:** The legacy Avaya system relied on basic call vectors and a fairly rigid interface, offering only very basic reporting and requiring manual, inefficient processes.
- **Security Requirements:** As a financial institution, security was paramount, requiring a secure platform as well as modern authentication methods to protect customer and internal data.

AT A GLANCE

Regulatory compliance met by seamlessly upgrading a Credit Union's contact center.

✓ 100% REGULATORY COMPLIANCE

Met a critical regulatory deadline by rapidly deploying the new contact center solution ahead of schedule.

✓ ENHANCED AGENT EFFICIENCY

Replaced manual follow-up and basic reporting with integrated scheduled follow-up, dispositions and holistic dashboards.

✓ SEAMLESS JOURNEY

Provided a consolidated experience for agents using Contact Manager for easy, secure transfers to specialized teams (e.g., home loans, credit cards).

Solutions

We implemented our contact center solution, focusing on speed, security, and empowering the administrative team:

- **Accelerated Deployment & Go-Live:** We successfully navigated a network upgrade dependency and achieved go-live well within the timeline, comfortably meeting the regulatory board's deadline. Crucially, we were able to create, configure, and test their initial contact center in just two hours following a single discovery session.
- **Enhanced Agent Experience:** Agents were provided with an intuitive UI that incorporated modern features, including:
 - **Scheduled Follow-Up:** Agents could now easily schedule follow-up actions directly within the platform, eliminating the inefficient manual process they were previously doing via their calendar and CRM.
 - **Wrap-Up with Dispositions:** Used to enhance customer record-keeping and ensure accurate data was tied to every interaction (account inquiries, password resets, transfers).
 - **Contact Manager:** Full use was made of the offering for both external customer and internal colleague contacts, creating a seamless and consolidated transfer experience for product-specific inquiries (home loans, credit cards).
- **Security and Control:** Single Sign-On (SSO) was implemented to enhance security and streamline agent access. Administrators received detailed sessions on call flow management, reporting, and dashboards, and were highly impressed with the ease of use and functionality for day-to-day control.
- **Unified Communications (UC) Strategy:** We concurrently implemented a Teams Calling package for all internal team members, supporting a holistic UC strategy alongside the new contact center.

Results

The smooth migration delivered critical compliance and operational improvements:

- **100% Regulatory Compliance:** The new platform was live before the critical regulatory board deadline.
- **Significant Efficiency Gains:** Agents moved from manual, fragmented processes to seamless, integrated workflows, particularly with the new in-platform scheduled follow-up and wrap-up features.
- **High User Adoption and Satisfaction:** The client was highly complimentary of the entire process, emphasizing that the implementation, training (approx. 3 hours total), and UAT were very smooth and well-supported.
- **Empowered Administration:** The new platform provided unprecedented visibility and control over the contact center operation and call flows, a major upgrade from the deprecated system.