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## Numerica Credit Union Enjoys Tremendous Efficiency Gains After Implementing Interactive Intelligence System from Adapt Telephony Services

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**Jo Brown, AVP at Numerica Credit Union**

With more than 75,000 members spread across eastern Washington and northern Idaho, Numerica Credit Union has a big job on their hands supporting their geographically dispersed members. The credit union has been providing high levels of service to their members since their inception over 70 years ago as Spokane Railway Credit Union. A few years ago Numerica made a commitment to installing the most sophisticated unified communications (UC) platform that they could find in order to help their employees manage not only voice communications, but also other non-real time communications such as email, chat and fax. They knew that UC would help make their lives easier, more mobile and efficient, and significantly boost member service levels, so they chose the top UC vendor dedicated to serving the credit union movement: Adapt Telephony Services.

Jo Brown, Numerica's AVP of the Member Service Center, was a key player in the choice of the credit union's new telephony system. That is perfectly understandable when you become familiar with her background: 7 years managing Numerica's contact center and over 15 years of hands-on call center experience. Brown points out that "the Spokane area is well known nationally as a haven of large and progressive contact centers, and I have made it a point to visit as many as possible and observe first hand their operations and technology." She adds that "over the years I have observed many other call centers in action across the US and I developed an extensive list of features that we wanted to implement."

The credit union proceeded to develop an in-depth Request for Proposal that they submitted to leading national and international telephony vendors, and that list was quickly narrowed down to three top candidates. Brown recalls that the decision was not that difficult because "Adapt's Interactive Intelligence-based system was head and shoulders above the rest. It only required 2 standard servers, while the other vendors were proposing numerous expensive servers." However, Numerica also wanted a vendor that not only had state of the art technology, but in Brown's words would "be committed to us for the long run and support our growth."

With 17 branches and a main office spread out over a large geographic area, the rollout had the potential to be troublesome, but Brown reports that "it was a big job, but it went really well. Adapt's engineer and project manager worked hard to make sure that implementation went smoothly and efficiently." The credit union installed 2 backup servers for redundancy and Brown explains that "there was great planning and communication on everyone's part to make sure that our 285 employees got up to speed quickly with the system. In a very short period of time our staff felt comfortable with the new platform and were enjoying using it."

### Credit Union:

Numerica Credit Union



### Solution:

Computer Telephony System

### Benefits:

- ❖ System improves staffing, scheduling & efficiency
- ❖ Call center attrition dropped dramatically after adoption
- ❖ Vendor has long term commitment to credit unions



Internally, the credit union setup a separate queue for their IT Help Desk and a separate sub-system for their Collections Department. Brown says that these moves "really improved staffing, scheduling and the overall efficiency of these two departments, plus the call recording and missed calls features are greatly appreciated by our Collections manager." As for her Contact Center, Brown enthuses that "this system has boosted our member service levels and made us so much more efficient - it is just amazing!"

In terms of training, the granularity that multimedia queuing and skills-based routing afford has proven invaluable. The credit union employs four tiers of member service representatives (MSRs) based on their experience and skill sets. Beginning MSRs are routed routine questions while top level MSRs are capable of simultaneously handling calls, emails and loan applications. Numerica employs an assortment of phone numbers that feed into specific queues, e.g., an 800 number on the back of their Visa card is directly routed to Visa experts at their headquarters, while specific phone numbers on their online banking pages are handled by knowledgeable online banking troubleshooters. The system is also fine-tuned to "remember" which MSR handled each member's last interaction so that if that MSR is available, then their call will be routed to that same agent again. Finally, MSR attrition has plummeted from over 50% to under 5% since the Interactive Intelligence system went live, which translates into tremendous savings in terms of hiring and training new MSRs.

Of course, no system runs itself, so Numerica occasionally calls on Adapt for support. According to Brown, "the lines of communication are always open with Adapt and their support levels are phenomenal. They share our enthusiasm for contact centers and the credit union movement in general." It is rare when a vision is realized, but Brown insists that "we had a vision of what we wanted and we got exactly what we wanted with this implementation. We could not be happier!" *t-t*

### About Adapt:

Adapt Telephony Services LLC powered by Interactive Intelligence specializes in providing credit unions with an All-In-One VoIP communication platform, designed for every aspect of sales, marketing, member service and collections. Our solutions are used by credit unions around the country with their assets ranging from \$100M to \$3B+. Our integration into core providers allows us to provide unique applications such as Screen Pops, In-Queue Balance Announcements, Last Deposit and Last Few Transactions, Past Due routing of outstanding collections directly to the Collections team and IVR with Speech Recognition.

We also offer a world class Multimedia Contact Center (queuing of Phone Calls, Web Chats, Emails, Faxes, Check Images, SMS/Text Messages), Automatic Rules-Based Recording and Quality Monitoring of All Media Types, Screen Recording, Post Call Surveys, Work Force Management, Outbound Dialing for Collections, Cross-Selling, On-Boarding, Emergency Notifications, Unified Messaging, and Fax Server capabilities, all with complete Disaster Recovery functionality.

These components are driven from a single standards-based software platform with a single administrative interface. With 100% all applications can be backed up at once and upgraded all at once. We can integrate to your existing phone system allowing additional functionality to your communications Platform.

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