CASE STUDY

Summary

Customer: Veterans United Home Loans

Headquarters:
Columbia, MO

Industry:
Finance – Mortgage

Product Replaced:
Proprietary employee directory system

Number of Users:
Agents: 30
Business Users: 1,375

Challenge:
Reduce employee profile data duplication and errors, while improving data details and accessibility.

Solution:
Interactive Intelligence PureCloud Directory℠

Benefits:

- Single point of access to employee profiles speeds searches and improves data accuracy for increased productivity and enhanced customer service.
- Employees can see at a glance who's on teams and projects for faster, more effective customer service.
- Integration with SharePoint will enhance sharing of information about office and employee locations for improved collaboration.

About Veterans United Home Loans

Veterans United Home Loans helps veterans and service members obtain affordable home financing through one of the last $0 down loan programs: the VA Loan. The company is committed to making the American dream of homeownership a reality for those who so bravely served. In 2013, Veterans United financed $4.1 billion in home loans. The company has about 1,400 employees and is headquartered in Columbia, Missouri with more than 20 offices in 20 states nationwide. For more information, call (800) 884-5560.

www.veteransunited.com

The Challenge

Bringing the dream of home ownership to military veterans keeps the staff of Veterans United Home Loans very busy. In fact, in recent years the company has grown its workforce from 300 to more than 1,400 people. "We're very knowledgeable about home loans for veterans and can provide these loans quickly," said Kathy McCulloch, infrastructure application team lead for Veterans United.

However, the five-fold expansion of the organization's workforce made it difficult to manage information about employees' roles and responsibilities, as well as reporting structures. Even finding where an employee was based could be difficult. "We have10 office locations and more than 20 branches," McCulloch said.

Veterans United had been storing information about employees in three systems: a human resources system from UltiPro, an employee directory that was created in-house, and an Active Directory database. "We had to create duplicate entries for each person in each system," McCulloch explained. "With duplication, we increased the chance of errors. It also took a lot of time to create multiple entries, and it was easy for someone to forget to fill out certain fields."

Veterans United has a focus on providing excellent service to customers and vendors, and the need to search multiple directories and confirm information slowed response times.

"Finding the person who could answer a particular question, or who could help move a loan application forward required some detective work," McCulloch said. "We needed a more unified solution for our employee information."

The Solution

McCulloch and her colleagues sought to replace the company's homegrown employee directory, which had limited search capabilities and was difficult to keep current.

"Because we're often creating informal groups and teams, we like to show these relationships in our directories," McCulloch said. "As a result, we needed a directory that would enable users to display these connections and give an easy way to contact each other, while at the same time change them quickly and easily as needed."

After researching solutions, Veterans United chose Interactive Intelligence PureCloud Directory℠, an enterprise collaboration application designed to enhance communication via rich, searchable employee profiles.

Accessible via browsers and mobile devices, PureCloud Directory℠ provided a unified directory, which included easily searchable profile content such as title, department, and location. It also included "one-click" contact options for email.

Of particular benefit to Veterans United, PureCloud Directory℠ offered data system integration and synchronization with Active Directory and HR systems.

"We liked the fact that PureCloud Directory℠ would easily integrate with our enterprise applications, creating a richer database of information about our employees via a single point of access," McCulloch said. "In addition, its browser and mobile device support would let employees search for colleagues even while away from the office."

The Benefits

According to McCulloch, PureCloud Directory℠ has given the company a single accurate and easily searchable view of employee data, while making data entry more efficient.

"In the past, inaccurate information led to inaccurate search results," McCulloch said. "Now we can be confident that employee information is current, and we can search by job title and location to more effectively find the right person for assistance. We've even found some unexpected uses for the new system, like entering t-shirt sizes so when we give shirts for special events we can order the right ones."

PureCloud Directory℠ has also enabled Veterans United to more effectively tap into the power of its informal groups and teams. "As a result of PureCloud Directory℠, employees can now see at a glance not just who's in a department, but who's on a specific project so they can better identify the most appropriate colleague to assist callers for faster, more effective service," McCulloch said.

Veterans United is in the process of integrating PureCloud Directory℠ with the company's SharePoint system. McCulloch expects to see additional benefits when this integration is complete: "Our PureCloud Directory℠ and SharePoint integration will enable us to display key employee location information that's maintained in a SharePoint list, thus further improving collaboration," she said.

The end result of PureCloud Directory℠ is that it's enabled Veterans United to communicate more effectively internally, thus respond faster to customer demands. "PureCloud Directory℠ has improved our ability to provide great service, which has helped us stay competitive," McCulloch said.