

CASE STUDY

Summary

Customer: Chevron Federal Credit Unions



Headquarters:
Oakland, CA

Industry:
Financial Services

Solution Replaced: PBX

Number of Users:
Agents: 25
Business Users: 225

Challenge:
Unify 20+ offices across seven states and provide seamless customer service for CFCU members.

Solution Deployed:

- Customer Interaction Center™
- Interaction Recorder®
- Interaction Dialer®
- Interaction Conference™

Benefits:

- Screen-pops allow agents to greet customers by name and access account details right away
- Integration with outsourced call center reduces hold times and improves call rollover
- Presence management and four-digit extensions improve communication between employees and members

About Chevron Federal Credit Union

Chevron Federal Credit Union (CFCU) is a not-for-profit financial institution dedicated to improving the economic conditions of its members. It serves more than 100,000 employees, retirees and families of Chevron Corporation and associated organizations. Founded in 1935, CFCU is headquartered in Oakland, California with branch offices in California, Louisiana, Maryland, Mississippi, Texas, Utah and Virginia. For more information, call 800-232-8101.

www.chevronfcu.org

The Challenge

Credit unions thrive on excellent service for members – something that’s fueled the steady growth of Chevron Federal Credit Union. However, CFCU’s commitment to meeting its members’ needs was affected by a disconnected network of more than 20 offices across seven states.

“We had several PBX systems with no unified communications,” said Sachin Kundra, CFCU’s vice president of information technology. “Our offices were all on different systems from local telco providers. If someone at one branch needed to talk to someone at another branch, they had to dial a long-distance number, resulting in high telephony bills. We also couldn’t transfer a member to another branch. We needed to change our system so we could bring all our branches together and operate as one company.”

The Solution

A contact center product with unified messaging was the main driver in CFCU’s search. Another important factor was the ability to integrate with existing systems, such as Symitar, an account management solution for credit unions.

CFCU considered contact center products from Avaya, Cisco, Mitel, ShoreTel and Interactive Intelligence. Kundra was keen to adopt a software-based product that offered a single platform running omnichannel applications.

“Most vendors buy and meld together solutions from other providers, then just slap a ‘unified’ label on them,” Kundra said. “For example, Cisco’s product is made up of several solutions, and we would’ve needed eight or nine physical servers just to run a single phone system.”

In the end, Kundra liked that the Interactive Intelligence product – Customer Interaction Center™ (CIC) – was an open, single-platform software suite built from the ground up to process all interaction types. “CIC was the most compelling choice, largely because of the integration possibilities,” he said. “None of the other vendors were able to offer this capability. In addition, it included presence management and other business user features that would enable us to provide more efficient service to members across all our offices.”

Along with CIC, CFCU purchased add-on applications for recording and quality management, outbound dialing and campaign management, and a conferencing feature to create, schedule and host internal and external conference calls. CFCU will also use the integrated CIC for Salesforce application.

CIC is used by 20 CFCU contact center agents in Oakland, and five work-at-home agents, as well as 225 business users company-wide.

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“Overall, CIC has enabled our contact center to reflect who we are as a company, and our culture of serving our members.”

The Benefits

CFCU’s partner, Adapt Telephony Services, helped integrate CIC with Symitar using Adapt’s Smart Applications for Credit Unions solution. As a result, agents now get screen-pops showing credit union accounts for each caller. “We all know the pain of calling our bank or another service provider, entering an account number and password into an IVR, and reaching an agent who has to ask for your identifiers again,” Kundra said. “Our members don’t have to jump through unnecessary hoops with agents. Our agents greet them by name and save time they’d otherwise spend looking up member account information.”

With an integration of CIC and Salesforce under way, Kundra anticipates further reductions in call time and improved service. “A CIC integration with Salesforce will enable us to authenticate members using account and PIN numbers,” Kundra said. “By the time the agent gets on the phone, the member will be fully credentialed, and the agent can start helping him or her immediately.”

Thanks to the combined impact of the Symitar and Salesforce integrations, Kundra expects to reduce average call time by 30 percent. “On an average call of four minutes, 60 to 75 seconds are spent on authentication,” Kundra said. “As we eliminate authentication time and calls become shorter, we can use our agents more efficiently – perhaps maintain the same staff numbers even if call volume increases.”

CIC is also integrated with Total Member Care, an outsourced call center for credit unions that handles overflow and after-hours calls for CFCU. “Before CIC, we had few options for directing calls to overflow – it was all or nothing,” Kundra said. “Now we can apply rules in any way needed, such as transferring calls to overflow if the call has been in the queue for more than three minutes. Our members don’t have to wait on hold as long, and we don’t ever have to play an automated message apologizing for a long hold time.”

Now that CFCU’s network of branches has unified messaging and presence management, the company’s 250 employees can simply dial a four-digit extension to reach a colleague. Using presence management can quickly determine who’s available when members have urgent questions. “CIC’s business telephony capabilities have led to a dramatic reduction in our long-distance bills,” Kundra said. “Even better, we can use its presence management feature to create warm transfers and a better experience for our members. Overall, CIC has enabled our contact center to reflect who we are as a company, and our culture of serving our members.”



Adapt Telephony Services, LLC (Adapt) is a global value-added reseller and integrator of on-premises or cloud-based contact center and unified communications solutions. For nearly 15 years, we have provided credit unions with CU-specific Smart Applications, pre-integrated with many financial cores and designed to transform the member experience, eliminate fraud and streamline member interactions. With more than 160 credit union clients, Adapt gets more out of the solutions we sell because we have the expertise, experience and disciplined processes to meet the challenges our credit union clients face in achieving a superior member experience. For more information, visit www.teamadapt.com.

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