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JoAnn Seipp Brown,

Assistant Vice President, Member Service Center, Numerica Credit Union

CASE STUDY



Issue:

Unified Communications through IP Communications Software Suite.

Benefits:

System improves staffing scheduling and efficiency of call center operations

Call center attrition dropped dramatically after adoption of Customer Interaction Center®

Adapt has a long term commitment and track record of success serving U.S. credit unions

About Numerica Credit Union

With more than 100,000 members spread across eastern Washington and northern Idaho, Numerica Credit Union has a big job on its hands supporting a geographically dispersed membership. It has been providing high levels of service since it started operations more than 75 years ago as Spokane Railway Credit Union. Numerica has been committed to installing and maintaining the most sophisticated unified communications (UC) platform it could find in order to help employees manage not only voice communications but also other non-real time communications such as email, chat and fax. Numerica knew that UC would help make everyone’s life easier and make them more mobile and efficient while significantly boosting member service levels.

It selected Adapt Telephony Services, the top UC vendor dedicated to serving the credit union movement, along with the **Interactive Intelligence IP communications software suite Customer Interaction Center®** as an ideal solution. Jo Brown, Numerica Credit Union’s Assistant Vice President at its Member Service Center, was a key decision maker in choosing the credit union’s new telephony system. That is perfectly understandable when understanding her nearly 20 years of hands-on call center experience. Brown points out that Spokane “is well known nationally as a haven of large and progressive contact centers. I’ve made it a point to visit as many as possible and observe first hand their operations and technology.” She adds that over the years observing other call centers in action across the U.S., she has developed “an extensive list of features that we at Numerica wanted to implement.”

Numerica Credit Union initiated an in-depth Request for Proposal which was later submitted to leading national and international telephony vendors. The list of potential vendors was quickly narrowed to three top candidates. Brown recalls the decision was not that difficult because “Adapt’s Interactive Intelligence-based system was head and shoulders above the rest. It only required two standard servers while other vendors were proposing numerous expensive servers.” Numerica, however, 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 a main office and nearly 20 branches scattered over a large geographic area in the Pacific Northwest, Numerica knew its telephony system rollout

could be troublesome, Brown reports that while “it was a big job, 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 two backup servers for redundancy. Brown explains that “there was great planning and communication on everyone’s part to make sure that all our employees became up to speed quickly with the system. In a very short period, our whole staff felt comfortable with the new platform and were enjoying using it.”

Internally, Numerica set up a separate queue for its IT Help Desk as well as a separate sub-system for its collections department. She says these moves “really improved our staffing and scheduling and the overall efficiency of these two departments. Besides, 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!”

During 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 handling several calls simultaneously alongside emails and loan applications.

Numerica employs an assortment of phone numbers feeding into specific queues. One, an 800 number on the back of its Visa card, is routed directly to Visa experts at Visa’s headquarters. Other specific phone numbers on online banking web pages are handled by knowledgeable online banking troubleshooters. The CIC system has been fine-tuned enabling it to **remember which Numerica MSR handled each member’s last interaction. If the particular MSR is available, the same member’s call will be routed to that same agent again.**

She reports MSR attrition now has plummeted from more than 50 percent to less than five percent since the Interactive Intelligence system went live. This translates into tremendous savings against the alternative of hiring and training new MSRs. Of course, no system runs itself, so Numerica occasionally calls on Adapt for support. According to Brown, “lines of communication are always open with Adapt. 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.”



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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