

*“Not only does our 30 person contact center love the system, but our help desk and other departments are big fans as well.”*

**Cameron Piercefield,**

Vice President of Technology at FORUM Credit Union

### CASE STUDY



**Issue:**

Closed, disparate systems producing high maintenance costs.

**Solution:**

Unified communications platform from Interactive Intelligence and systems integration from Adapt.

**Benefits:**

- Single vendor solution
- Lower support costs
- Powerful desktop client
- Easy to use system
- Knowledgeable support engineers

### About FORUM Credit Union

FORUM Credit Union is a full-service financial institution serving the greater Indianapolis and central Indiana region. Not only is FORUM well known as a credit union industry leader, in 2010 it was named a “*Top Place to Work*” and ranked in the top 25 for mid-size companies by the *Indianapolis Star*.

Recognizing that both employee and member communications are the foundation of its organization, FORUM has invested in Customer Interaction Center™ (CIC), the top software-based Unified Communications (UC) system in the world from Interactive Intelligence and installed and supported by Adapt Telephony Services.

Prior to CIC’s deployment, FORUM utilized disparate systems but which were very difficult and expensive to manage and maintain. Cameron Piercefield, FORUM Credit Union’s Vice President of Technology, recalls how “our old system was quite closed. We wanted an open architecture that would give us more power and flexibility.” Seeking relief from “bolt-on” additions, high maintenance costs and poor vendor support, the credit union put together a team to research a handful of leading UC vendors. The team’s conclusion was unanimous: CIC was hands down the best. “I liked CIC and Adapt right out of the gate and so did all of my colleagues in other departments,” Piercefield notes.

With an extremely easy to use, but powerful, desktop client, training FORUM’s 300-plus employees did not present any issues. In fact, the credit union opted for a complete cutover of all phones over one weekend. Piercefield adds that “we have a very dedicated IT staff. Adapt sent us engineers to help and they were great.” With so many moving parts within a complex project such as at FORUM, there are numerous opportunities to get off track. Yet Piercefield maintains that “Adapt’s project manager was incredible. We had a very smooth implementation from start to finish.”

With any technology cutover, there will always be minor glitches. In this case, the Web Chat module did not fulfill FORUM’s contact center needs out of the gate. In response, the Adapt and Interactive Intelligence developers went quickly to work to develop the exact functionality that the heavy Web Chat users in the contact center who need to satisfy members. “It was obvious that the team cared about us and our particular situation. We appreciated the speedy

and helpful response,” says Piercefield. He emphasizes that “not only does our 30 person contact center love the system, but our help desk and other departments are big fans as well.”

Disaster recovery features have also been enhanced with the system. According to Piercefield, “the system works great for telecommuters and it is quite easy to manage call queues.” Plus the credit union’s popular IVR (interactive voice response) system is tightly integrated with its in-house Fiserv core data processing system. Piercefield points out that “Adapt’s developers did a really good job tying in our IVR to our core platform - our members never noticed a thing when we executed our cutover.”

Even though FORUM is a \$1 billion dollar asset credit union, it along with all credit unions must watch budgets closely. Piercefield explains that “our TCO (total cost of ownership) went down by 20% - these are real numbers that do not even take into the account the time and energy saved by not having to contact numerous vendors for support.” Looking over the project from start to finish, Piercefield, who has more than 15 years of experience at FORUM and 20-plus years of IT experience, confirms that “one of the best things that you can say about a project is that in hindsight we would do it again. In this case, we would work with Interactive Intelligence and Adapt all over again and not change a thing.”



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