



**Enghouse
Interactive**



CASE STUDY:

PARTNER COLORADO CREDIT UNION

OVERVIEW

Credit Union

CUSTOMER PROFILE

11th largest credit union in Colorado with 30,000+ members and assets totaling \$348.41M.

GOALS

Required a comprehensive omni-channel contact center solution with seamless integration to help collaboration.

SOLUTIONS

Enghouse Interactive
Communications Center, Quality Management Suite & Snapshot

BENEFITS

- Seamlessly integrates with Avaya IP Office, allows for more collaboration across the entire organization
- Integration of Quality Management and recording technology allows for extensive and effective reporting

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How the Partner Colorado Credit Union Enhanced Member Experience, Operational Efficiency and Organizational Performance with Enghouse Interactive

ENGHOUSE SOLUTIONS

- Communications Center
- Quality Management Suite

TELEPHONY

- Avaya IP Office

ABOUT THE CUSTOMER/CUSTOMER PROFILE (30+ Agents)

Partner Colorado Credit Union (Partner Colorado) — unlike publicly-held banks, which are beholden to shareholders — is owned and operated by members. The credit union offers the high-quality banking services expected from a well-established financial institution, but with better rates and personal service. In addition to its in-branch, online and mobile banking services, Partner Colorado also provides free financial education seminars and financial reviews.

CHALLENGES

- Lack of visibility for agents and managers
- Inability to integrate with Avaya IP Office and 'home-grown' CRM
- Limited functionality and systemic roadblocks to productivity
- Unreliable and costly to maintain

Like many financial institutions, Partner Colorado was hamstrung by legacy contact center technology that hindered its ability to collaborate with both internal and external stakeholders. The platform's lack of interoperability with Avaya IP Office, the telephony platform used across the credit union, forced the contact center onto a completely separate phone system, isolating support and collections personnel on an island, away from the rest of the organization. The impact on service levels was evident, and both employees and customers suffered from the disparate phone system's tendency to drop calls.

Agents also struggled with the platform's lack of user-friendly design, which, coupled with the aforementioned deficiencies, rendered the contact center solution inadequate for member support and other interactions. The legacy call center system's inability to integrate with Partner Colorado's home-grown CRM system was as big of a problem as its limited functionality. The absence of 'presence' and flexible reporting prevented critical visibility on many levels; agents were in the dark about a caller's history and their colleague's availability, and managers had no viable way to monitor or effectively report on performance.

Call transfers were another pain point and a major drain on resource utilization. Agents who routed a member to a colleague were forced to stay on the line for the duration of the call, otherwise, the line would disconnect.

Further illustrating the archaic call center's limitations was the problem tracking callbacks; it could neither recognize when a return call had been placed nor which issues had been resolved. Agents wasted both their own and members' time by making multiple callbacks to people whose problems had already been addressed. Call times skyrocketed and members were often stuck in queue longer than they should have. The resulting confusion was clearly detrimental to customer experience and unnecessarily consumed time and other Partner Colorado resources.

Personnel across the organization, devoid of means to collaborate, could not execute their daily assignments in a timely, efficient manner. The legacy call center platform's inherent obsolescence monopolized the time of internal IT who were inundated with daily requests for support, and the need to develop "workarounds" for problems – just to maintain daily operations. All parties suffered from the absence of any alignment with workflows.

SOLUTION

Partner Colorado Credit Union embarked on a search for a new contact center platform with several key criteria in mind that led it to directly Enghouse Interactive. Core requirements included seamless integration with Avaya IP Office and its home-grown CRM system, as well as ease-of-use for agents and flexible reporting.

By selecting Enghouse Interactive Communications Center (CC) and Quality Management Suite (QMS), Partner Colorado Credit Union found a solution that was intuitive, highly functional, reliable and that provided visibility into each touchpoint of the member experience.

Enghouse Interactive's technology appealed to Partner Colorado for several reasons: streamlined integration with Avaya IP Office; omni-channel functionality; agent-centric design; as well as the breadth and depth of the company's engineering and support teams.

Communications Center is one of the most popular contact center platforms available today, deployed by over 4,000 organizations across the world. Communications Center is a modular, feature-rich, omni-channel contact center solution that is designed to operate natively on leading IP Telephony platforms (including Avaya, Cisco, NEC, and Microsoft Skype for Business), and that offers multiple deployment options for on-premises, hosted, and hybrid environments.

Communication Center's compatibility with third-party technology supports numerous options for system integrations. For Partner Colorado, Enghouse's use of open APIs allows integration with the in-house CRM. Instead of having to toggle back and forth between different screens and applications, agents proactively receive relevant and useful data on callers via ScreenPop. Communication Center's extensible tabs for CRM and other resources reduce app hopping and enable efficient call handling, transfer and conferencing through an optimized UI.

The seamless integration of Communication Center with QMS provides the built-in quality assurance and reporting capabilities that Partner Colorado Credit Union's contact center managers coveted, including: Call Recording for voice recording and review; Agent Evaluation for call scoring and agent coaching; Computer Recording enables desktop screen capture; and Screen Recording allows for live interaction monitoring. The QMS Scorecard feature ties it all together (voice recording, screen recording, evaluation, etc.) for evaluation and training.

ROI & BENEFITS

ROI Measurements at Partner Colorado Credit Union are primarily based on customer experience.

- Reduced call and hold time
- 360-degree visibility into call center operations
- Quality management and flexible reporting
- Resource utilization and marked improvements in efficiency and collaboration
- User Experience: Omni-channel functionality, ease-of-use, and agent-centric design
- Integration & Interoperability: Seamless integration and interoperability with Avaya IP Office and a home-grown CRM system.

Upon going live in March of 2017, the intuitive nature of Enghouse Interactive's TouchPoint interface allowed agents to ramp up with ease and much quicker than anticipated. Empowered by Communications Center with key functionality like presence and skills-based routing, agents were elated with their new-found ability to deliver an exceptional, expedited member experience on each interaction.

As Enghouse Interactive solutions integrate seamlessly with Avaya IP Office, the entire organization was now connected on a single telephony platform; agents were rescued from their island and could now connect with colleagues through a dial-by-name directory. The addition of chat and high-touch gave agents the tools they always needed, but to which they never had access.

From day 1, Enghouse Interactive solutions stood out as very user friendly and eliminated the need for workarounds. Integration with Partner Colorado's CRM system empowered agents with screen pops to keep track of time spent on each call, and queue status to ensure no member waited on hold for too long. Access to call history provided insight on each member's situation and previous interactions, allowing agents to deliver informed service and support with both alacrity and precision.

Another high-value attribute is Communications Center's Service Level Dashboard. Enghouse has simplified how Colorado Partner Credit Union measures service levels, keeping agents motivated and in-tune with their team. Real-time visibility of service levels shows areas of strength and where there is room for improvement. In addition, transparency as to performance and metrics like call volume and hold times keeps agents accountable to one another.

For managers, QMS allowed for call recording and easy access to a myriad of customizable reports. Extensive functionality that it is both comprehensive and intuitive provides unprecedented visibility into agent performance and is an invaluable resource for education and training.

When asked what she appreciated most about working with Enghouse Interactive, call center supervisor emphatically replied, "Visibility! I can now see every aspect of call center operations and can access, analyze and share data quickly and easily. What's also important to note is that now we can track inbound sales leads, and identify opportunities for proactive marketing."

"Enghouse Interactive has exceeded all of our expectations on every level. I cannot express how much the relationship with Tom Farquhar and the team enhances the engagement. The level of service and attention is exceptional, which combined with contact center technology that lives up to its reputation, has directly impacted our entire organization's efficiency and performance."

— Partner Credit Union's Chief Information Officer

ABOUT ENGHOUSE INTERACTIVE

Enghouse Interactive's integrated suite of solutions includes multi-channel contact center, self-service, attendant operator consoles and workforce optimization. This wide portfolio places us in the unique position to offer customers and partners a complete, fully featured solution from a single vendor. These solutions support the full range of deployment methods from premise-based to private, public or community cloud and hybrid requirements.