

“The success of Seattle Metropolitan Credit Union is defined by our members and the products and services they enjoy from SMCU. Our contact center is key to delivering a successful member experience. Click2Coach® not only helps us remain compliant, but also assists our agents in getting the coaching they need to deliver tremendous member experiences.”

Lynn Roberts, Contact Center Manager

Seattle Metropolitan Credit Union Success Story

Seattle Metropolitan Credit Union, also known as SMCU, was founded in 1933 by City of Seattle municipal workers and has since then grown with Seattle, Washington, one of the most rapidly growing cities in the country.

Companies, such as, Microsoft, Amazon and Google have helped fuel tremendous growth in membership opportunities for SMCU. Seattle Metropolitan Credit Union understands what the Seattle area values being a local credit union means they work very hard to make a difference in the lives of the people of the region; members or not. They also donate to non-profit partners, such as, The Seattle Humane Society, with each new Feel Good Checking account opened.

Challenges

SMCU members help build SMCU and share directly in its success. Because they are a financial cooperative, SMCU returns earnings back to its members in the form of better rates and services. When members receive exceptional customer service, they refer others to join which grows membership and benefits for all.



Results

- Increased recording to 100%
- Automated QA process
- Expanded recording capabilities from member care to include compliance
- Launched successful online banking experience

Industry

- Financial Services

Product/Solution

- Click2Coach Cloud
- Quality Monitoring
- Compliance Recording

Customer service has always been a priority at SMCU. However, without the right technology in place, it had been a challenge understanding some key factors driving this:

- What are members calling about and how can we assist them better?
- Which products and services are working for members and which are not?
- How can we improve the quality of the agent/member interaction?
- How can we use technology to ensure compliance with the NCUA regulations?

The answers to these questions are critical to SMCU's success. This focus has become even more important as SMCU competes against other credit unions and banks for member acquisition and retention.

SMCU had a quality assurance program in place but it was manual and relied heavily on the agent to initiate recording and identify calls to review with supervisors. There was no formal structure in place to evaluate interactions and improve agent effectiveness, nor was there any interaction recording to help resolve member complaints or miscommunication.

Lastly, while contact center management was familiar with the importance of a quality management program and the tools available, SMCU didn't have the budget to acquire a traditional workforce optimization solution with expensive hardware, software and professional services. That was until they found the right solution.

Solution

Using Click2Coach Cloud, SMCU was able to go from a manual quality program to recording 100% of their member interactions. Using these recorded interactions, they were able to run agent analytics to identify coachable moments, trending within their interactions, and utilize the eLearning and coaching features to improve agent effectiveness. This has driven a direct increase in membership satisfaction, employee engagement, referrals and compliance.

Using Click2Coach Cloud, SMCU was able to implement and achieve their quality program goals without being burdened by the costs of an expensive on premise workforce optimization tool. Using the cloud, no hardware was required on-site and the software was provided on a subscription basis. This gave SMCU access to a solution that prior only their larger competitors could acquire and utilize.

"The greatest benefit has been an increased sense of accountability from my team and desire to improve their member interactions," said Lynn Roberts, SMCU's Contact Center Manager. "By using Click2Coach, we were able monitor, coach and deliver on our objectives."

Seattle Metropolitan has benefited tremendous results from implementing Click2Coach Cloud. Supervisors now have the tools necessary to capture, evaluate and train agent/member interactions which has directly lead to increased member satisfaction. Supervisors at SMCU now have a workforce optimization solution that includes call recording, screen capture and performance analytics, all in the cloud, for a low monthly fee.

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SUCCESS STORY

Envision

Envision helps companies better align and integrate the people, processes and technologies within the contact center to drive exceptional customer service. Our belief is that continuous agent improvement helps maximize every contact with customers, which ultimately drives increased contact center and enterprise performance. Envision offers a complete Workforce Optimization suite to aggregate, monitor and analyze data and performance at the agent, contact center and enterprise levels. It is comprised of multiple applications including Envision Workforce Management™ for scheduling, forecasting and staffing, with applications for quality monitoring, identity protection and compliance, and analytics; and the industry-renowned Envision Click2Coach® for fully integrated quality monitoring and management, e-learning, automated coaching, robust analytics and performance management capabilities. Visit www.envisioninc.com, email info@envisioninc.com or call 206.225.0800 for more information.