

Resolving Member Requests

Advantis CU automates its member service processes, helping ensure that no inquiry falls through the cracks, and boosting its member service scores.

December 2010

As Advantis Credit Union has grown over the years, so has the number of service requests it receives from its members. One big challenge the credit union faced was how to make sure those requests didn't "fall through the cracks" as they were communicated from front-line staff to the back office. Advantis CU realized it had to ensure member requests were handled promptly and accurately or members might look elsewhere for their financial services.

\$734 million Advantis CU, based in Milwaukie, Ore., ventured out to the marketplace in search of technology that could streamline its member contact and service request needs with a goal to automate and track these items to improve response time and the quality of responses. After a lengthy search, the CU discovered the memberWORKS Relationship Management system from [fiVISION](#), Indianapolis. This technology was created to help a credit union's staff become more responsive and more productive, while providing them with the support tools they need to effectively serve and, ultimately, sell new products to members.

The memberWORKS Relationship Management system offers a collection of individual modules – service request management and contact management to name a couple – designed to enhance member service capabilities. Each module works seamlessly with the others and can be deployed in almost any configuration to fit a credit union's specific needs, including a variety of core systems.

"In Advantis CU's case, we were looking for a solution that would help us deliver consistent, exceptional service," says Tim Clouse, VP/information technology. "This technology prevents service requests from falling through the cracks, and reduces the time it takes to resolve issues. With task creation and monitoring functions, it enhances communications between departments and speeds service delivery."

Advantis CU implemented memberWORKS in August of 2008 and, almost immediately, service scores based on "spot" member surveys increased—from 6.44 (out of 7.0) before implementing the solution to 6.70 within 60 days of implementing the technology.

In the surveys, members said the credit union's staff was being more responsive to their requests and were more knowledgeable handling and resolving their requests. Turnaround time (the time it takes from initial request to resolution) was reduced in some cases from days to an average of 2-3 hours for a member request resolution.

"All of a sudden our member service scores jumped up," Clouse says. "We know the new technology we implemented prior to these positive scores is a big part of the reason."

Why? With this module, Advantis CU's staff can configure the system to collect member requests and get them routed quickly and efficiently to the right place within the CU for fulfillment or resolution. The module's service request tickets

assist the credit union's front-line staff in collecting accurate information the first time. For example, Advantis CU has about 50 different request types, including "Lost & Stolen Plastics," which prompts staff to ask for the type of plastic, reason for ordering and how it should be delivered. The tickets also provide helpful reminders about the credit union's processes, automatically sending the request to the correct personnel.

According to Clouse, the credit union's responding staff can now keep notes about the resolution and update everyone with the current status of each request. Built in escalation tools visually alert Advantis CU employees involved with the requests that they may be taking longer than standard service level commitments. For example Advantis CU's Lost & Stolen Plastics request has a warning time of two business hours and becomes late at four business hours after the request. These escalation tools ensure timely support.

The contact management module provides the ability to capture and record contacts with members using "contact categories" or free form text. Categories can be modified on the fly as needs change. The module also includes a reporting feature to analyze why members are in contact with various parts of the credit union. For example, Advantis CU could analyze the top 25 reasons members called its contact center last week.

"We see the essence of member service being improved by having the capability to capture our service history for each member," Clouse explains. "From this data, we can assess if any service modifications are needed in a particular area. This information is very helpful to us.

"Overall, we see this technology as a big benefit to our credit union," he adds. "Prior to implementing it, we had challenges managing some of our member service requests – which, unfortunately, lowered our service level across the board. This was unacceptable. Incorporating it into our member service processes has truly been a great improvement."

Advantis CU plans to add more modules in the near future. For example, there's also an online service request module that extends ticket and request capability to a self-service environment behind the PIN on a credit union's Web site. Advantis CU plans to take advantage of this module, as it will enable the credit union to field service requests directly from members 24/7. The module then routes the request to the correct personnel for a timely resolution – just as if it had been entered in a branch or the call center. Member of Advantis CU who make requests on line can see the status of the request while it is in process for enhanced communication, as can staff.

"The online service request will extend our credit union's ability to serve members around the clock," Clouse says. "Our members want to be served on their schedule – and if we handle the request in a timely manner, we'll also hear about it in a positive way. Obviously, we strive to keep our members pleased – and as our recent service satisfactory scores have reflected, that's what this technology allows us to accomplish."

Mike Lawson owns DML Communications in San Diego.

© 2010. CUES. All Rights Reserved.