SUCCESS STORY

The next generation CRM system transformed member experience by improving efficiencies for one of the largest Credit Union

Challenges

DCU encountered the following business challenges due to the legacy system:

- Lack of workflow and processes in SRs leading to operational inefficiencies as the work was transferred back and forth for clarifications between back office teams and front-line staff
- The application did not provide comprehensive customer profile to agents
- Service level agreements were not enforceable in the existing application
- CTI was not integrated leading to inefficiencies
- Urgency and prioritization was primitive
- High call times with agents required to work on multiple systems to take calls and handle customer cases
- Limited reporting and visibility of work

Solution

- Virtusa developed a robust and scalable application utilizing Pega Customer Service for Financial Services framework:
- Integrated with 15 different systems with more than 50 integration points to reduce the number of systems agents access to service calls
- Embedded CTI interface with customer portal for call handling efficiency.
- Cloud based implementation
- Automated process flows with system driven data and exception validations
- Maximize use of OOTB capabilities for ongoing application maintenance
- Enhanced reporting for work management, SLA tracking, operator efficiencies

Value delivered

- Improved member experience with automated SR updates through email
- Improved agent experience and thus efficiencies with comprehensive all encompassing 360-degree member view
- Scalable application for unhindered growth with cloud-based implementation
- Low time to market and transition in ~6 months.
- Operational efficiency with insights into SLA adherence
- Reporting to provide actionable insights
- 20% Reduction in call handling allowing DCU to service more members without adding staff
- 30% Reduction in call transfers with improved first call resolution rates
- Vast simplification through intent driven SRs thus reducing SR type by >70%

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