Helping Credit Unions Support their Members

Sonoma
Technical Support Services

The Sonoma Advantage

What Sonoma offers is more than 13 years of experience combining superior customer service and technical know-how to give credit union members the support they need. By utilizing the power of the Internet, and with the advent of modern communications and technologies, we are able to operate a secure, geographically dispersed help desk staffed by senior-level customer service specialists 24/7. In short, Sonoma can:

- Attract senior-level technical support analysts with the skills to take each call through to completion;
- Source and utilize experienced talent throughout North America;
- Provide immediate response time and single point of contact;
- Provide 24/7 support to your customers;
- Provide multilingual talent (English, Spanish and French);
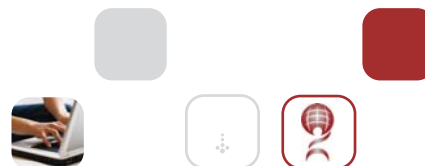- Easily accommodate sudden increases in call volume.

Sonoma's customizable services allow you to retain the responsibilities you want in your daily operations, while we assume only those customer service requirements for which we are uniquely suited. This allows you to focus on your core business, while we manage the customer service experience. Help-desk support is private-labeled according to your brand and business requirements. When members call to get assistance, they will receive the same personal quality of service you would provide. We can use your existing support numbers or provide new toll-free numbers. By customizing our help- desk services to meet your needs, we can help you to offer your members:

- A highly personal approach;
- Immediate answers to their questions;
- Immediate reassurance and resolution if they make a mistake;
- Education on policies and procedures;
- Online training.

Our Services

Online Banking

As banking becomes more automated, it brings tremendous freedom and accessibility to your members, while at the same time creating unique challenges. Encouraging members to do more of their banking online requires that you understand and address their concerns and questions in a timely manner, thus limiting frustration and even the fear of making mistakes. There is nothing more reassuring for members than knowing they can bank on their own time and access a live help-desk representative at any time of the day or night.

Since the 1994 introduction of online banking, **Sonoma Technical Support Services** has been a pioneer in providing expert, help-desk support services to the members of both large and small credit unions across Canada. Today, more than two million credit union members utilize our round-the-clock help desk. Sonoma has become a trusted partner through its commitment to excellence and by giving members the comfort of knowing help is available – day and night.

Today, Sonoma is an expert in providing help-desk support services for:

- Online banking,
- Banking system conversions & upgrades,
- Lost and stolen debit cards.

For many Credit Unions, persuading members to utilize new online banking services, and providing the ongoing support necessary to help members use these services, is difficult and expensive. The costs associated with maintaining a traditional bricks-and-mortar office facility; recruiting, hiring and training staff; as well as purchasing the necessary technology to run an effective customer support centre, have become prohibitive. Sonoma's combination of experience, help-desk expertise and state-of-the-art technology addresses these issues in one comprehensive package.

Here are some of the key issues our representatives resolve on a daily basis:

- General information (i.e. how to use functions);
- Login procedures (invalid member number and personal access codes);
- Account information (balance and detail variances);
- Adding bill payment vendors;
- Setting up recurring payments / stop payments;
- Browser issues (upgrades, security warnings, popup blockers, incompatible versions);
- Exporting (statement downloads to Quicken, Money, Simply Accounting);
- Transfers (one time / future dated / recurring);
- HyperWallet (setup and unsuccessful transfers).

Banking System Conversions & Upgrades

Credit unions often struggle to give members a high level of support during the upgrading or conversion of banking systems. Many simply do not have the resources to manage the conversion and support members at the same time. Sonoma has assisted credit unions by providing members with a comprehensive call-in support service during conversions. We specialize in ensuring your members' questions and concerns are addressed quickly, thereby reducing frustration and enhancing the customer experience. Some of the conversion issues we are adept at helping you manage include:

- New member number assignments.
- New PAC assignments.
- Understanding your new statement format, including:
    - New terminology;
    - Multiple entries for a single transaction;
    - Transaction fees and interest charges.

Lost or Stolen Debit Card Support

Sonoma provides a 24/7 call-in service to members who have lost or had their debit card stolen, thus ensuring immediate cancellation. This service will significantly reduce your risk of liability or loss, while giving your members peace of mind.

Our goal is to work with you to design a process that meets your credit union's specific requirements. Using data you have provided Sonoma, our help-desk personnel will rapidly verify the caller's identity, giving instant notification to the switch-system provider to disable the card. An email is also sent to the branch allowing your own member-services representative to follow-up.

How Our Help Desk Works

Sonoma has invested in a secure, help-desk platform to manage the entire contact experience. Our platform serves as a comprehensive customer support system that allows each credit union to interact with operational data via a web-based interface. We can customize our services to meet your specific requirements, whether you need us to manage your entire help-desk operation or provide back up after hours. Our goal is to augment your existing customer service objectives.

Multi-Channel Help Resolution: Our help desk blends support via phone, email, and online chat – all of which are captured so you have access to a complete online history of each subscriber's interaction.

- Phone Support- our sophisticated phone technology allows us to prioritize and route calls to customer service specialists who can ensure calls are answered within a pre-determined time and with a high level of first-call resolution.
- Email Support- all email addresses and content are private-labeled according to your brand and business requirements.
- Online Chat -provides support via text-based interactive chat sessions with our help desk consultants.

Multilingual Assistance: We can provide support in English, French and Spanish.

"Providing excellence at the point of customer contact."

ase Detail [Go To : Customer Service/Case List/Case Detail]

Customer: [_____] 🔍 **Company Detail**

Start date: [04/04/2007] 📅 Start Time [05:35 PI] ⬍   Deadline: [04/04/

Case Owner: [Admin Admin ⬍] Priority: [Medium ⬍] Assigned to: [Admi

LD Branch# [_____ ⬍]

Name [_____] Phone Number [_____]

iption [_____]

[_____ ⬍] 🔍   Subcategory: [

Trouble Ticketing System: Our trouble ticketing system efficiently manages customers' help requests, while streamlining the support process. Essentially, this system serves as a tracking and work flow management tool, which helps us to:

❖ Capture and record all customer interactions;

❖ Review trouble ticket status and severity;

❖ Adhere to pre-determined escalation policies and procedures;

❖ Identify and eliminate chronic service delivery problems;

❖ Automate work flow and decrease resolution time;

❖ Offer demand-call recording;

❖ Offer time-call monitoring.

Knowledge-Base Library: The knowledge base is a secure, dynamic library of information which both you and our support team build collectively. Information stored in the knowledge base could include:

❖ Contact lists;

❖ Policies and procedures;

❖ Support documentation and matrices;

❖ Marketing collateral.

Self-Help: Sonoma can make the information contained within the knowledge base accessible directly to the customer using the Internet. This allows customers to use our tools to help resolve problems on their own. A customized, POS support site can be created giving customers access to the following information:

❖ Answers to the most Frequently Asked Questions (FAQs);

❖ Software downloads;

❖ Support documentation.

Reports and Trend Analysis: Our Trouble Ticketing System provides valuable, real-time reporting and statistics which enable you to:

❖ Gain visibility into accurate, real-time subscriber intelligence;

❖ Identify top call-drivers and problem areas;

❖ Use subscriber intelligence to continually review and improve your product offerings.

Managing your Business

At Sonoma, we believe a help-desk operation provides an important way for you to maintain a dialog with your members and ensure you understand how they feel about your products and services. It is also an ideal way for you to trouble shoot and continually fine-tune your products and services.

By utilizing our tools, you will never lose touch with your members. Our technology allows us – and you – to monitor on a real time basis what is happening at "your" help desk. We give you access to the information you would have if you were operating your own help desk. With our technology, here are some examples of the information we can track:

❖ How many calls are made daily;

❖ How many calls are in the queue;

❖ Our average response time;

❖ The average length of a call;

❖ Call drivers (why people are calling).

Sonoma's success is built on a foundation of trust. If you are looking for an experienced partner with a proven track record to help you better support your customers, then Sonoma is the right choice. We understand there is nothing our clients value more than quality customer support and protecting the security of their members' personal and financial information. We will work closely with you to ensure we meet all your needs and concerns while providing a highly professional and secure service that will help your organization thrive in our ever-changing technical world.

www.sonomaservices.com / **1 866 898 3123**