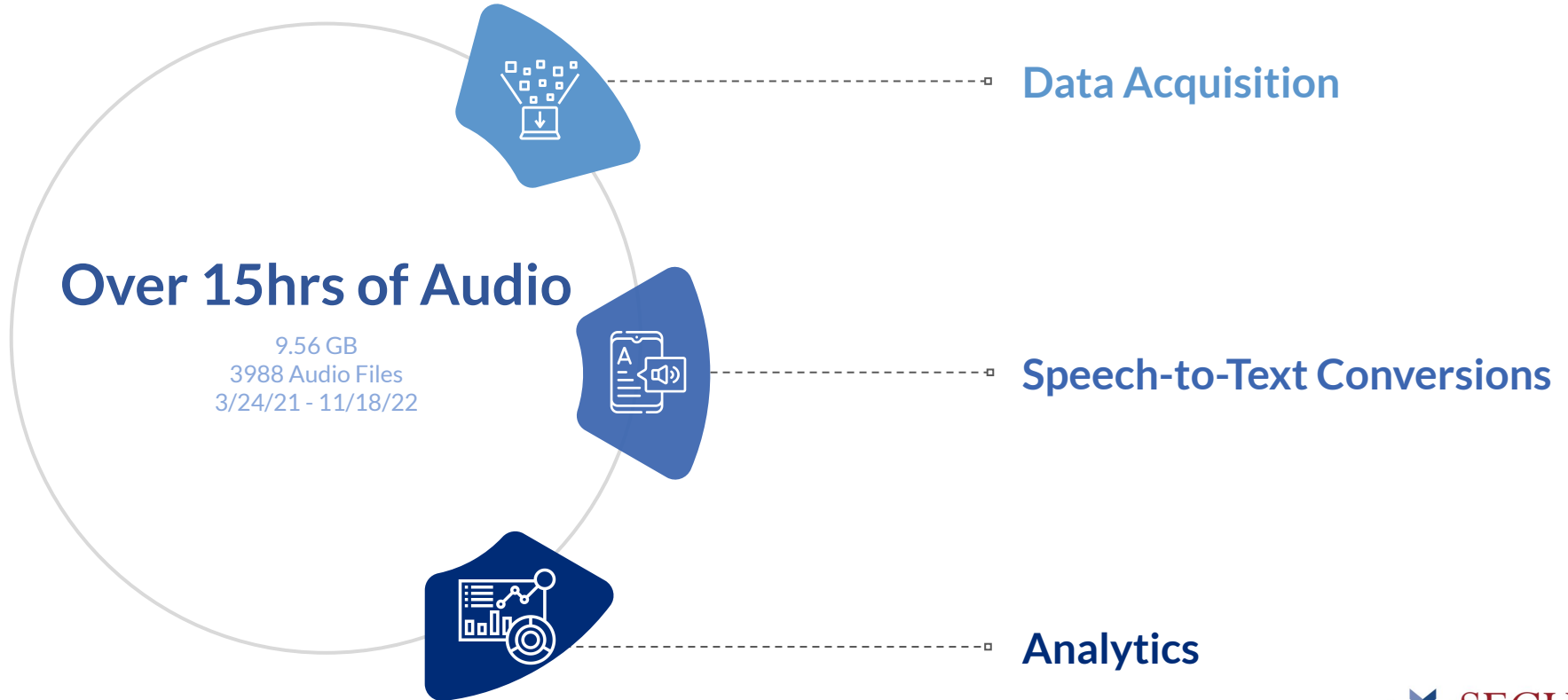
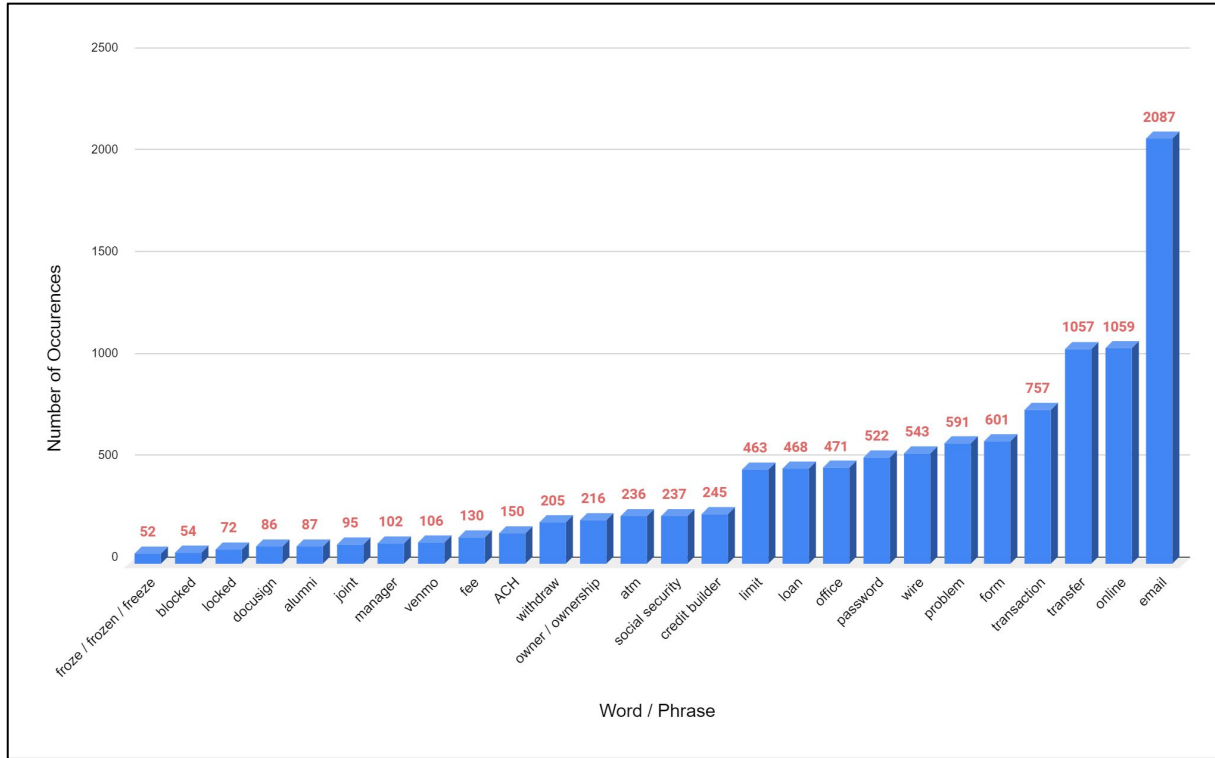


Call Analytics: What We've Learned

Project Overview



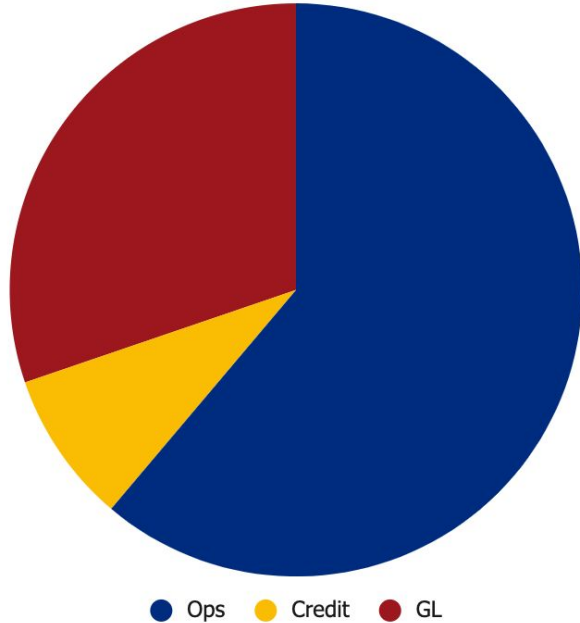
Keyword Frequency Analysis (Number of Occurrences vs. Word / Phrase)



Takeaways

- Most frequently used words relate to transactions, online banking, and transfers
- Anticipating need
- Refining Training

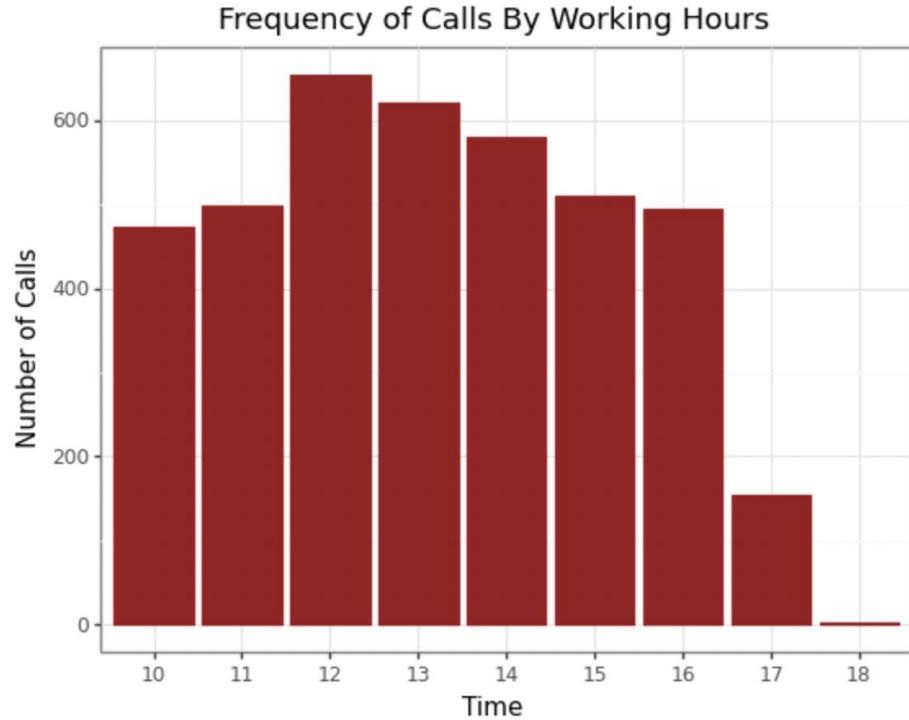
Area of Need By Committee



Takeaways

- Importance of Ops/Staffing
- Necessity of transparency and offline support

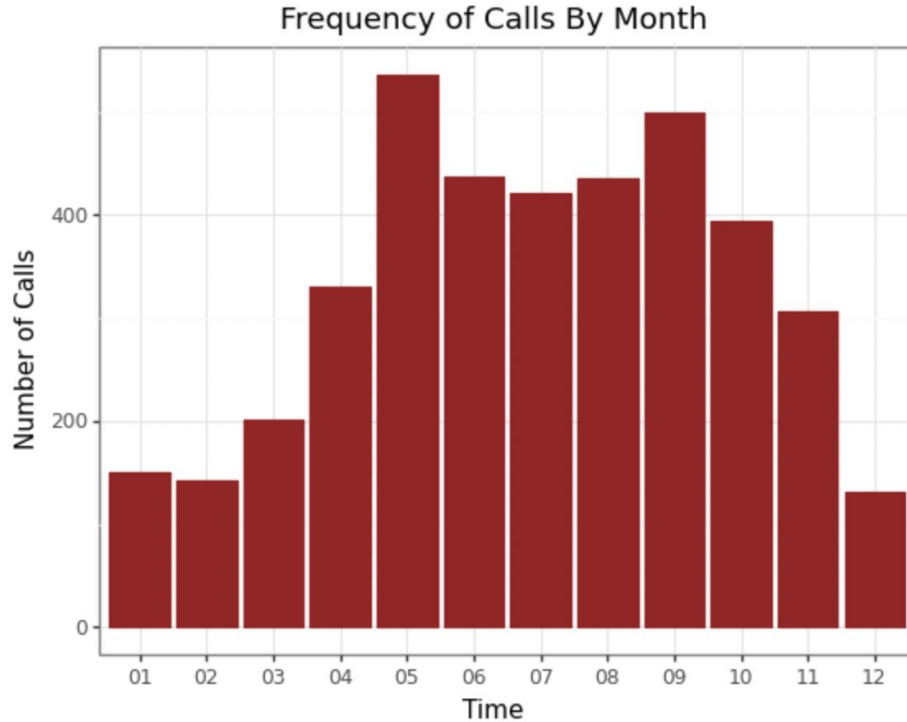
Frequency of Calls



Takeaways

- 9 calls per day
- Peak Hours: 12-2pm
- Assigning time slots based on training/experience

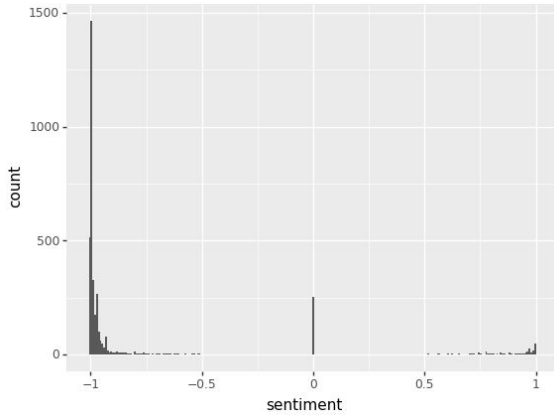
Frequency of Calls



Takeaways

- Far fewer calls in winter (Why?)
- Significance of Summer Managers

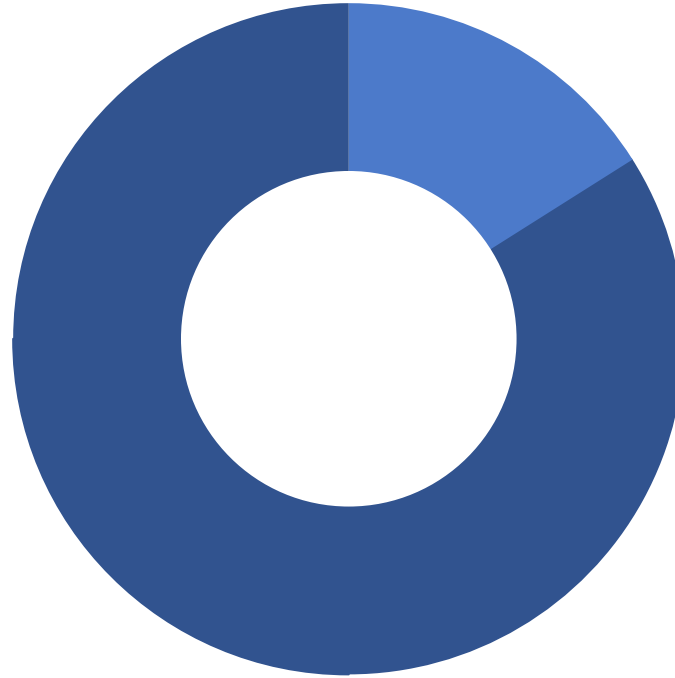
Sentiment Analysis



3383 calls

Negative Overall

Taking into account customer +
SFCU sentiment



353 calls

Positive Overall

Tends to imply positive
sentiment from both SFCU and
customer

What Do With This Data



Simplify ops training

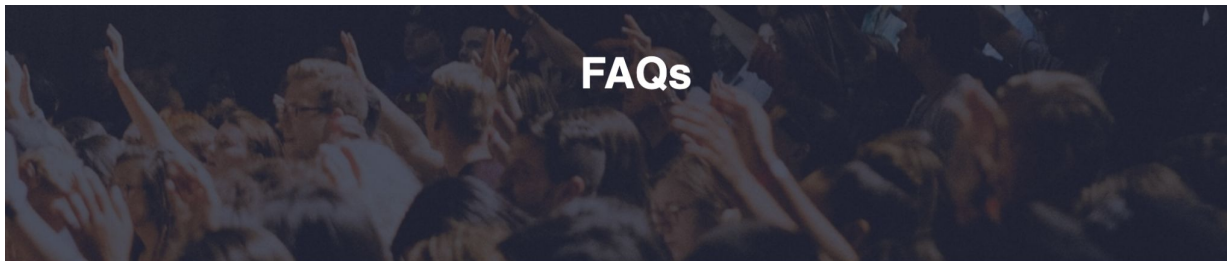


Increase traffic during the winter months



Revamp our online FAQs

FAQs



Card

☐ I'm planning to travel, what should I do to make sure my card works?

☐ What are common reasons that cause my card to stop working?

Account

☐ How do I initiate electronic funds transfer to move money into the SFCU?

☐ Where can I get information about the online banking platform?

☐ How do I link SFCU accounts to Venmo/Paypal?

☐ What's my account number at the SFCU?

Appendix

Frequency of Calls By Month and Year

