avtex >

Corporate Headquarters:
3500 American Blvd W, Suite 300
Bloomington, MN 55431

1-800-323-3639
marketing@avtex.com
www.avtex.com

Avtex Helps Neighborhood Credit Union Implement New Contact Center Solution

Neighborhood
CREDIT UNION

Case Study

As the oldest credit union in the Dallas-Fort Worth metroplex, Neighborhood Credit Union serves over 50,000 members in Dallas County, Denton County, Ellis County and the surrounding area. For nearly 90 years, Neighborhood Credit Union has focused on providing excellent member experience, both online and in their 14 area locations.

At-a-Glance

Implementation of contact center environment

Nearly 200 total users

17 geographic locations

21-week timeline

Summary

Avtex Helps Neighborhood Credit Union Implement New Contact Center Solution

People, Processes and Technology Lead to Wholly Successful Project

Neighborhood Credit Union relies heavily on its contact center to support members throughout the Dallas-Ft. Worth area. "Many of our current members, as well as prospective members, reach out to our contact center for help with account questions, information on products or our organization, or for help resolving an issue," said Bonnie Schmitz, SVP of Information Technology at Neighborhood Credit Union. "We need that experience to be enjoyable, effective and seamless for our members; we pride ourselves as an organization on delivering the support and care to every member."

Unfortunately, issues with their old contact center solution, including a lack of timely updates, limited functionality and increasing prices, made delivering quality member interactions difficult.

"Our old platform lacked many of the features we were looking for, including many that have become standard on other contact center platforms, such as skill-based routing," Schmitz said. "We wanted to explore other options that allowed us to deliver those features and functionality to our members, and our staff."

Neighborhood turned to Avtex for assistance in identifying and implementing a better contact center solution.

"The folks at Avtex helped us examine our organization's goals and needs, which helped us better understand exactly what we needed and what we were looking for," Schmitz said. "With their guidance, we selected PureConnect from Genesys as our new contact center platform."

Identifying the new contact center solution was just the beginning, however.

"Choosing the platform was just the first step; we also needed to implement the solution as efficiently as possible, with as little impact to our members and agents as possible," Schmitz said. "To do that, we needed a partner who understood the challenges of a complex contact center implementation and had the people, skills and tools to get the job done."

Avtex delivered there, as well. In just 21 weeks, the implementation team at Avtex guided Neighborhood through the process of implementation, switchover and creation of a development environment on the PureConnect platform.

A Proven Approach to Complex Technology Implementation Projects

Contact center implementations are often complex processes involving a number of moving parts and stakeholders. Neighborhood CU's implementation was no exception.

"We had a ton of things going on at the same time, including a change in our telephony vendor and several other initiatives that could impact the success of the contact center project," Schmitz said. "Avtex took the perfect approach to the project and made it happen in a timely and efficient manner."

A number of factors contributed to the successful implementation and minimal impact to users.

Strategic Planning and Methodology

Successful technology implementations start with a sound plan and methodology. Prior to project launch, Avtex delivered a comprehensive strategy, including a clearly defined timeline, roles and responsibilities and more.

"The project method and timeline Avtex delivered was fantastic. It was easy to follow, clearly defined and accounted for the smallest of details," Schmitz said. "It made it easy to plan, staff and schedule on our end."

Advanced planning allowed the project to get started on the right path, and kept the process moving forward.

> "We were just wowed by everyone on the Avtex team"

Communication

Effective communication between the Avtex team and Neighborhood CU's team also played a key role in the success of the project.

"The constant communication between us and Avtex was critical to the project. They went above and beyond in making sure we had the information we needed," said Matt Janes, Project Manager at Neighborhood CU. "Any time we needed to ask a question, no matter what time or day, someone from Avtex was available to answer."

Weekly status calls and regular updates helped keep all stakeholders apprised of the project's progress.

"During those calls, everyone was able to see exactly where we were, where we needed to be, and what we needed to do to get there," Janes said. "No one was left guessing as to what had been completed or what needed to be done next. The regular cadence of updates helped move the project from step to step."

The Right People

While planning and communication are certainly crucial to the success of any implementation, it's the people involved that actually have the most impact on a project.

"We were just wowed by everyone on the Avtex team from the very beginning and throughout the project," Schmitz said. "Every single person involved had extensive knowledge of the technology, the challenges of an implementation and the project as a whole. That wealth of knowledge, combined with their willingness to share it, made the Avtex team so great to work with."

"The people at Avtex astounded me. Their knowledge, ability to work with us to facilitate change, and the overwhelming support made, what we would designate as a challenging implementation due to the level of change, the huge success it was," Janes said. "We always knew what to expect, and who to turn to for advice. Even after we are live, we're still able to reach out to them and pick their brains. They continue to help whenever we need them."

The End Result

Avtex helped Neighborhood Credit Union execute a complex implementation process on time, on budget and without major issues. The successful implementation left the team at Neighborhood CU very pleased.

"This year alone, we've undertaken a number of high-risk technology projects in an effort to improve member experience, including a core system migration, debit card conversion, merger and the contact center implementation with Avtex," Schmitz said. "This project was by far the best of all three, and one of the best experiences of my career."

"From start to finish, the project progressed very smoothly," said Janes. "While there were hurdles to overcome, the Avtex team helped us overcome them and limit the impact on the project. On launch day, everything went smoothly and perfectly, with very few issues and little impact on users. It was exactly what you hope for in a go-live date."

Since the implementation, users have enjoyed PureConnect's rich feature set and capabilities.

"Our user base is very happy with the new system. They have nothing but good things to say," Schmitz said. "We are pleased to see the overwhelmingly positive reviews, and are even more excited for the future as PureConnect really gives us the flexibility to grow and evolve moving forward."

Additional phases and enhancements to Neighborhood Credit Union's PureConnect instance are already underway, with Avtex lending support.

> This year alone, Neighborhood Credit Union has undertaken a number of high-risk technology projects in an effort to improve member experience, including a core system migration, debit card conversion, merger and the contact center implementation with Avtex. This project was by far the best of all three, and one of the best experiences of my career. Avtex has the people, the technology and the strategic vision to make complicated projects seem simple.
>
> –Bonnie Schmitz, SVP of Information Technology at **Neighborhood Credit Union**

About Avtex

Avtex is a full-service Customer Experience consultancy focused on helping organizations build trust with their customers. We guide organizations through the process of creating or improving CX strategies, platforms and policies. Avtex offers a wide range of services to support CX, including CX Consulting, Technology Optimization, Technology Innovation and Systems Management.

Driven by technology know-how and passionate about customer experience, Avtex is uniquely qualified to help you deliver exceptional experiences to your customers.

avtex

Corporate Headquarters:
3500 American Blvd W, Suite 300
Bloomington, MN 55431

1-800-323-3639
marketing@avtex.com
www.avtex.com