

Five Point Credit Union

Telephony Solutions Reap Big Dividends for Credit Union

The advanced functionality offered by Cistera's CallCenterRecord and QuickRecord provide FivePoint Credit Union with powerful tools to enhance customer service, employee training and security.

The goal of providing superior customer service is almost the definition of a "business basic." After all, what company aims to provide poor customer service? But as every executive knows, their task is to actually deliver on the promise of superior customer service, by finding and using the tools that allow them to monitor, measure and continually improve the customer experience.

Ensuring Call Center Quality

"FivePoint's mission statement is to improve the quality of life for our members and our community," says Kenneth Miller, Senior Vice President for Accounting and IT at FivePoint Credit Union. That means any product or service offered to FivePoint's approximately 40,000 members in its Southeast Texas service area "must make their lives easier, so they are not standing in a long teller line or spending a long time on a phone call," Miller adds. "Our goal is to take care of our members' financial needs so they can go on with the rest of the things they need to do."

FivePoint's call center is "an integral part of our service to our members," Miller notes. "The agents handle anything regarding a member's account, and also take loan applications on the phone and provide approvals on the spot. It's a dedicated department, with its own requirements and goals."

"We needed a system that would randomly provide a selection of calls for every agent over a given period of time," explains Miller. Managers reviewing this random selection apply a number of criteria to each call, such as: Was the operator courteous and friendly? Did they meet the member's expectations? Were actions accomplished in a timely manner? Did they use the member's name at least three times during the call?

CHANGING THE WAY YOU THINK ABOUT ENTERPRISE COMMUNICATIONS

Customer Profile: FivePoint Credit Union, based in Port Arthur, TX, is the largest credit union in Southeast Texas, serving approximately 40,000 members in a five-county area. Originally started in 1935, it is now the largest not-for-profit institution in Southeast Texas, and is open to anyone in its service area.

Business Situation: After deploying an IP-based telephony system, FivePoint sought additional functionality for its call center, including the ability to randomly select calls for purposes of employee reviews, coaching and new hire training. The company was also looking for better methods of recording calls, especially disturbing calls that needed to be archived "on the fly."

Solution: Cistera's CallCenterRecord randomly selects calls and helps managers analyze them, providing a statistical basis for performance reviews as well as a strong coaching tool. QuickRecord provides FivePoint executives with call recording capabilities that can be activated at any time during the call, capturing the entire conversation from first ring to hang-up.



“Cistera’s application did just what we asked,” says Miller. “It randomly generates calls, puts them on the screen and we can rate each call based on a sliding scale. This gives us information for coaching sessions with the agents. In addition, their performance reviews are tied to the statistics that we get from their calls. They know that this is how we measure their performance.”

In addition, CallCenterRecord’s ability to archive specific calls provides FivePoint with real-world examples of both “good” and “bad” calls, an invaluable tool for helping new hires recognize what constitutes quality service. “During training, we replay these good and bad examples,” notes Miller. “We then discuss the pros and cons of these conversations, so the new hires understand more clearly what’s acceptable.”

Unique On-the-Fly Recording Capabilities

Any business must eventually deal with calls that, for one reason or another, should be recorded. “Thank goodness it’s not too often, but sometimes we receive disturbing calls, such as a threat or an irate member, where the call recipient says ‘I wish I had had that recorded,’” notes Miller.

Since the nature of any given call isn’t always clear from the beginning, the optimal solution is to be able to capture an entire troubling call at any point—whether it’s in the first minute or in the final few seconds. That’s precisely the capability offered by Cistera QuickRecord, one that has “proven itself time and time again,” according to Miller.

“Cistera was the only company out of four or five that we looked at capable of doing on-the-fly quick recording,” he adds. “Most systems would only record from the point forward when the function was activated, but Cistera can back up to the very beginning.”

Miller notes that this function, which is available to FivePoint senior executives “who have high-level contact with our members,” also offers strong benefits in human resources situations, such as ensuring a conversation with an ex-employee is archived and available.

QuickRecord’s unique functionality also enhances security, according to Miller: “Shortly after we installed QuickRecord, we had a bomb threat. We were able to record the call and the Caller ID information, and provide that information to the police. Before we installed QuickRecord we had not had such a capability.”

Cistera’s advanced functionality is complemented by its tight integration with FivePoint’s Cisco telephony system, according to Miller. “Because Cistera was an IP-based phone system, it was relatively easy to deploy,” he says. “In addition, the user screen for the back office managers has the same look and feel of the Cisco Call Manager interface, so there was not a lot of re-learning for our people to do.”

That ease of integration is important to an organization that likes to be “cutting edge” in its approach to technology, while still maintaining—and consistently improving—the products and service it provides to its members. “The tight integration with the Cisco system makes Cistera a product that fits into our organization,” says Miller. “It’s a happy marriage between our technology and the direction we’re moving in.”

Cistera Networks is a leading provider of enterprise communications platforms and services. The company blends powerful application infrastructure with industry-specific business processes, to deliver the benefits of voice, video and data convergence to the user. Cistera’s industry-leading platform delivers the most reliable, scalable and secure application services for IP-based network environments. Its broad portfolio of application services enables users to improve customer service and satisfaction, increase productivity and collaboration, improve responsiveness to critical incidents and to provide a safer environment.

Based on open standards and a proven server technology foundation, the award-winning Cistera ConvergenceServer has a single unified administration which delivers the lowest total cost of ownership in the industry. It enables customers to create robust and scalable environments that are flexible enough to adapt to their changing needs by scaling up to support from fewer than one hundred to thousands of users, and scaling out to support multiple sites, making it ideal for a broad range of organizations.

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