

Orange County Credit Union

Customer Success Story

Opportunity

Orange County's Credit Union (OCCU) is a not-for-profit credit union in California, United States, serving individuals living or working in Orange, Los Angeles, Riverside, and San Bernardino Counties.

OCCU faced short-staffing issues and other challenges in its contact center as a result of extremely high traffic. Their inbound-only contact center handled as many as 35,000 calls per month. OCCU had 21 full-time employees in its contact center as well as about 20 part-timers.

OCCU was made of seven branches that process a total of 216,150 transactions in a single month. That works out to approximately 31,000 transactions per branch. High traffic volumes turned the efficient scheduling of agents into a constant struggle for call center management. As a result, branch managers struggled with short-staffing issues. With forecasting based on past experience and the managers perception of trends, it was impossible to avoid scheduling errors. A better solution was required.

A decision was made to search for a contact center software solution, but one that was flexible and included features that OCCU required.

Solution

OCCU evaluated all the top contact center software solutions. Most vendors were unable to offer a flexible solution for both agent and teller scheduling that OCCU desired. OCCU selected Verint® Monet Workforce Management™ (WFM). OCCU's technology platform included Avaya for all PBX and phone-related systems, Windows 2000, XP Systems for branch transactions, CentreVu Supervisor for call center reporting, T1 lines for data and VoIP for voice.

Benefits

The Verint Monet WFM solution streamlined and improved forecasting and scheduling, resulting in shorter call times and improved service levels. Verint Monet WFM took the guesswork out of staffing, which allowed OCCU to reassign employees as needed to eliminate coverage gaps. Best of all, it did this while also achieving full ROI in less than one year.

VERINT.
MONET



Solutions

Verint® Monet
Workforce Management™



Industry

Credit Union



Region

Americas

Results

- Saved at least \$25,000 by eliminating the guesswork from profitability analyses and scheduling
- Service levels improved by 5%
- Conversion rate improved

Verint Monet WFM delivered a unique feature set that improved OCCU's efficiency. For instance, the capability to forecast, modify and monitor agent occupancy rates is displayed next to the current call history and service level objectives. This allowed for even greater contact center flexibility during the agent scheduling and adherence process. Verint Monet WFM also enabled call center managers to determine the exact cost of existing schedules as well as planned schedule changes. The system automatically modeled and balanced improved service levels and reduced customer wait time against the necessary cost to provide it.

Other benefits include:

- Exception planner allowed recurring exceptions and mid-day exceptions to be automatically scheduled, taking all exceptions into account when choosing shifts and scheduling breaks.
- Availability calendar permitted contact center managers to see how existing exceptions affect staff availability. Managers can select any set of dates from the entire year and view agent requirements and availability, along with the number of exception hours, broken down both by agent and exception type.
- Forecasting capability revealed that experienced agents worked the early shift while peak traffic came later in the day resulting in longer call times and plummeting service levels. Management changed schedules to keep more experienced agents working later hours.
- Shift creation was individualized and special needs were more easily handled with the graphical roster report.

By adding Verint Monet WFM, branch managers removed the guess work from staffing. Every half hour, transactions were uploaded to the solution and available for analysis. Eventually, if one branch becomes overstaffed on a particular day, OCCU will be able to use the system to reassign that employee to another branch that is running short.

Verint Monet WFM has, according to OCCU, saved at least \$25,000 by eliminating the guesswork from profitability analyses and scheduling, creating an ROI of less than one year. Service levels have also been improved by at least 5 percent.

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