Essential Credit Union reduces call handle time and abandonment rates with Xima Contact Center Software

Essential Credit Union is a community-chartered credit union founded in 1972 by a group of Dow Chemical employees in Baton Rouge, Louisiana. Offering outstanding financial services at low cost to more than 46,000 members, Essential manages $378 million in assets. In addition to a growing set of physical branches, the organization also offers web and telephone services.

Challenge

- Update contact center functionality

- Enhance ease and speed of reporting

- Boost service levels by maximizing agent availability

Solution

- Deployed Xima Contact Center as a cloud-based solution

Benefits

- Improved call handle time and average wait time

- Reduced abandoned call percentage

- Empowered agents to achieve monthly targets

- Enhanced efficiency and quality of service to members

"My agents are very happy with the solution, especially because I can tell them where they're at in terms of their monthly goals."

– Tee Collins,
Call Center Supervisor, Essential Credit Union

Essential Credit Union

At Essential Credit Union, outdated software and reporting tools made it hard to gauge contact center performance. By deploying Xima Contact Center, the organization has significantly improved the visibility of key metrics. Essential has also enhanced overall service levels, improved call handle time and reduced the percentage of abandoned calls.

Seeking a Clearer View

Essential's primary contact center in Baton Rouge employs eight full-time agents and handles all incoming calls. Agents are trained to handle inquiries on all products and services, with the goal of being able to resolve issues within a single call.

Although the contact center was performing well, Essential recognized shortcomings with its existing management software. Tee Collins, Call Center Supervisor at Essential, explains: "Our software was a bit dated, and the reporting was not good at all. On the managerial side, we wanted to make it easier to gain an overview of status. We were looking for modern features that would help with overall management, and for the ability to roll out AI features in the future."

As well as improved reporting, Essential wanted better post-call coding arrangements. The goal was to make agents available to take new calls sooner, thereby improving overall service levels.

Smooth Rollout, Improved Usability

Aiming to find new contact center software that would allow it to continue with its existing telephony provider, Essential researched a number of options.

"It was like trying to find a needle in a haystack," recalls Collins. "We weren't making progress, so we asked GAGE, a former telephony partner, for a recommendation."

GAGE recommended deploying Xima Contact Center, a full-featured, cloud-based solution for modern contact centers. The solution offered everything Essential was looking for—standard features such as call priority, call forecasting and pre- and post-disposition, but also post-call surveys and modules for workforce management and optimization.

Xima provided an onboarding consultant to review Essential's requirements and recommend best practices. The implementation team built custom service-level and agent-working-rate reports,delivered supervisor training, tested the solution and provided post-go-live hypercare for the critical first 30 days.

"The process from Xima was comprehensive and it was great to learn about all the unique tools," says Collins. "Xima provided easy-to-follow training videos for our agents, and we were pretty much ready to roll right away."

The Xima solution requires agents to select one or multiple codes upon completing calls, enabling managers to see the support topics that are trending and apply remediation as appropriate. After coding, the system automatically pushes the next call in the queue after 15 seconds, so that members are not kept waiting on the lines.

"Maneuvering to the next call has become seamless with Xima," says Collins.
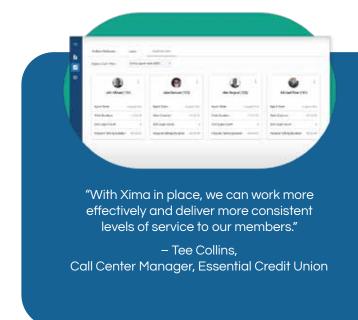
45

Hitting Targets across the Board

"People don't always like change, but we're seven months in with Xima and everything is running smoothly," says Collins. "My agents are very happy with the solution, especially because I can tell them where they're at in terms of their monthly goals. I pretty much live on the supervisor dashboard."

Agents are incentivized on several metrics including call handle time, average call abandoned rate and overall service level. Before Xima, group targets were often missed. Now, handle time, average wait time and abandoned percentage have all fallen, producing incentives for team members. Overall service level hit 90% in December, having fluctuated between 50 and 70% before the adoption of Xima.

Live metrics from Xima are displayed on wall-mounted screens in the contact center, making performance visible to the organization as a whole. This underscores the collective commitment to serve members as diligently as possible.

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– Tee Collins,
Call Center Manager, Essential Credit Union

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Delivering Better Service Levels

"The contact center is a vital channel for answering routine questions and keeping departmental teams free to work on other priorities," says Collins. "It's therefore very important that our agents have the best software to manage calls. With Xima in place, we can work more effectively and deliver more consistent levels of service to our members."

Essential is now turning its attention to rolling out workforce management with Xima. By analyzing call data, the organization expects to reveal actionable insights into member behavior as well as better predicting incoming call volumes for more efficient operations.

"We're looking forward to taking advantage of all the features that we have with Xima," concludes Collins. "Working with the Xima team has been great so far. Anytime I've brought something to their attention, they have been resourceful in remedying things and sharing best practices."

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Page 5