

Maestro Projects Group Helps CFE Improve Call Center Service

Institution:	CFE Federal Credit Union	Assets:	+\$1.1 B
Address:	P.O. Box 785005 Orlando, FL 32878-5005	Members:	119,000
Telephone:	(407) 896-9411	Locations:	12
Website:	www.cfefcu.org	Core Software:	USERS' DataSafe®

Integrated Solution Tracks Member Service Events

Members increasingly expect access to 24/7 service and a consistent experience across delivery channels. Until now, tracking and managing members' service activity has been challenging, especially when multiple staff members are involved on the same issue over time. Maestro Integration Services helped CFE Federal Credit Union (Orlando, FL, \$1.1 billion, 119,000 members) overcome this challenge by making it easy to log, track and manage member service activities, providing a consistent view and experience.

An Eye On Service

CFE was familiar with the work of Maestro and its tremendous value, having already completed several Maestro initiatives, including an account enrollment workflow project. It was this successful experience that led CFE to call on Maestro to help with its Member Relationship Management (MRM) implementation – a project fueled in part by a desire to improve the service provided through its call center.

"We're driven by member service from the top down," says Senior VP Kevin Dougherty. "So even though our call center does a great job – earning high marks from our members and having only

a 2% abandonment rate – we were still looking to improve our level of service through this channel."

Specifically, CFE wanted its call center staff to have access to each member's complete service history through its call center software (a product of GalaxyPlus, another Fiserv business unit). Dougherty says this step was critical to helping the credit union develop an "organizational memory."

"No matter who takes a member's call, we want the end user to have a more complete and accurate view of the member's account details, service activities, and other interactions with the credit union," Dougherty explains. The goal was to avoid the frustrations that result when members are asked to reiterate their service issue or question each time they contact the credit union or work with a different staff member.

To achieve this goal, the credit union called on the Maestro team to integrate its call center solution with the USERS Teller Navigator platform with which CFE's staff was already familiar. Now, the credit union's staff has the tools to better manage a member's service events – interactions that take place outside of financial

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transactions, such as a request for information or service. MSRs, call center reps, and other front-line employees can view, edit, create, and track service events within the Teller Navigator solution they already use daily.

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Besides improving service, the integration of these solutions is also increasing staff efficiency. Once a service issue is recorded, CFE employees can easily work and manage queues containing the service issues

their department has been assigned to handle. CFE also has the option to automatically route a service event to the department responsible for handling the required fulfillment – such as mailing information about a product or sending out a replacement debit card.

Moving to 24/7

In addition, CFE believed that having a 24/7 call center capability would be critical to providing the highest level of service. Previously, members who called CFE after standard business hours were only able to leave a message in a voice mailbox. CFE believed that the addition of a third-party, remote call center would enhance its service, by allowing members to reach the credit union by phone at their convenience.

With that goal in mind, CFE contracted with PSCU and its CU Always 24/7 call center. However, CFE realized that its success in using a remote call center demanded tight integration between CU Always and the credit union’s core DataSafe® system.

“We knew we would need to integrate these solutions, in order to give PSCU call center staff access to the core system database and its up-to-the-minute information on member accounts,” says

Dougherty. “I immediately thought of Maestro as the right source to handle the integration.”

The Maestro team provided tight, real-time integration of CU Always and the core DataSafe® system, providing the credit union with significant benefits.

“The real-time interface means the remote call center staff has full access into our core database for member data, so there is no delay,” Dougherty says. PSCU staff uses the software – as well as a knowledge database containing details on CFE-specific products and policies – to handle member issues after hours. The CU Always staff sees the same complete, accurate view of the member’s account details and his or her service activity as any CFE employee would. Once a transaction takes place or a question is answered, the activity is recorded in real-time. And if a member’s request can’t be fulfilled by the remote CU Always call center after hours, the credit union’s staff will receive an open ticket to work on the next day within Teller Navigator.

“The Maestro team has done a phenomenal job for us,” Dougherty says. “The integration of these solutions has been seamless, and we’ve had no issues at all.” Though it was a major undertaking, the development work only took about three months, allowing CFE to move quickly on a critical project.

“Maestro gave us the flexibility to integrate our core system with a call center product that was very important to our business,” he says. “As we continue to use more specialty products from third parties, I know we’ll use Maestro for more integration work.”



To arrange for a demo contact
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