

PenFed Credit Union transforms member services with TTEC Digital



About PenFed

PenFed is one of America's largest federal credit unions, serving nearly 2.8 million members worldwide with \$29 billion in assets.

At a glance

- Reduced agent after-call work time by 50%
- Reduced case rework and routing time by 20%
- Maintained high NPS

PARTNERS

- Genesys
- Salesforce

INDUSTRY

Financial Services

SERVICES PROVIDED

- Member experience transformation
- Cloud migration

PRODUCTS USED

- Genesys Cloud
- CX Cloud from Genesys and Salesforce

The challenge

PenFed faced several operational and technological hurdles that limited its ability to deliver a seamless member experience. Its legacy voice communication systems were outdated and lacked the flexibility required for modern omnichannel engagement. This resulted in a disjointed experience where

members often had to repeat information across different service channels, leading to frustration and inefficiencies. Additionally, the existing infrastructure was not scalable enough to support PenFed's rapid growth, nor its ambitions for future innovation in member experience.

The solution

PenFed Credit Union partnered with TTEC Digital to modernize their member experience by migrating their contact center to Genesys Cloud and integrating it with their Salesforce CRM through CX Cloud. This transformation enabled seamless omnichannel engagement, secure authentication, and real-time access to member data. TTEC Digital also implemented AI-powered tools such as conversation summarization, and predictive workforce management to enhance service quality and operational efficiency. The partnership emphasized continuous innovation, allowing PenFed to rapidly adopt new features and expand capabilities.

The results

The collaboration between PenFed and TTEC Digital led to meaningful improvements in PenFed's operations.

Significant efficiency gains:

- Reduced agent after-call work time by 50%
- Reduced case rework and routing time by 20%

Enhanced member satisfaction: Members experience seamless, personalized service across all channels, with Net Promoter Score (NPS) maintained above 70.

Streamlined omnichannel workflows: Back-office teams report easier handling of different types of work (calls, emails, cases) through Salesforce Omnichannel.

Automated quality assurance (QA): Integration of transcript data enables automated QA on every call, allowing QA teams to focus on outliers.

Future-ready infrastructure: A scalable, cloud-based platform supports ongoing innovation and growth.

"TTEC Digital understands our goals and who we are as an organization, which is incredibly important to us. They provide excellent support throughout development, implementation, and ongoing operations. They're responsive, helpful, and I know that when I escalate an issue, it gets the attention it needs."

Nicole LaCamp

*Senior Vice President, Platform Strategy & Engineering
PenFed Credit Union*

About TTEC Digital

TTEC Digital is a global leader in customer experience orchestration, combining technology and empathy at the point of conversation. With in-house expertise in CX strategy, data and analytics, AI and more, TTEC Digital delivers an unmatched skillset for organizations looking to forge deeper customer relationships and drive better business outcomes. Learn more at ttecdigital.com.

