INDUSTRY | FINANCIAL SERVICES (CREDIT UNION)

KITSAP
CREDIT UNION

A member-owned financial cooperative that encompasses over a dozen branches and prides itself on delivering convenient services that elevate its members' financial wellbeing.

Challenge

In 2023, a credit union engaged us with the intent of migrating its billing and service operations — which were collectively handled by five disparate systems — into its Financial Services Cloud org. But after some discussion, we realized that the customer had an immediate need for a streamlined, intuitive, and well-documented service process. Pre-implementation:

- The credit union used multiple systems to uphold its service process
- Kitsap maintained 50+ service events in FSC, many of which were redundant
- Service processes were cumbersome to follow and difficult for new hires to learn
- Service representatives has to spend significant time navigating systems and finding information, which extended time-to-resolution and impacted member experiences
- The credit union sought to streamline its foundational service workflow, consolidate events, improve case documentation, and make serving members more intuitive and efficient for agents.

Solution

We assisted Kitsap Credit Union refine its Case & Opportunity Management processes and build out an efficient contact center within Financial Services Cloud. We also integrated FSC with the institution's core banking system to enhance case management. Our consultants:

- Helped Kitsap reach a cross-team consensus on service event requirements and configurations.
- Enabled Kitsap to significantly reduce the amount of time required to log and track service events; reconfigured service events to be informative and easy to use.
- Built a seamless, automation-supported workflow to facilitate efficient and satisfying service interactions.

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PRODUCTS USED

Financial Services Cloud

Outcome

Post-project, our client is able to:

- Significantly accelerate time-to-resolution on service cases
- Reduce inefficient swivel-chairing between systems
- Simplify case structures to make serving customers more intuitive for employees and new hires