



iQ Credit Union Partners with Avtex to Reinvigorate Employee and Member Experience

About iQ Credit Union

iQ Credit Union is a member-owned, modern-day financial institution based in the Pacific Northwest. With a growing community of more than 90,000 members and over 300 employees, iQ Credit Union is incredibly focused on their mission of helping each one achieve their financial goals. From first cars and college acceptances to starting businesses and marriages, iQ Credit Union celebrates the adventures of all their members and employees – no matter the paths taken.

At-a-Glance

- Onboarded new contact center technology to strengthen remote employee experience
- Moved from legacy contact center to cloud-based solution
- Adopted mobile texting to improve member and employee efficiency
- Delivered new member-facing apps to streamline communication

Category

Employee & Member Experience, Cloud Contact Center

Industry

Financial Services

Services Provided

Genesys Cloud Contact Center Deployment, SmartApps for Cloud, Workforce Management (WFM), Genesys Managed Services & Training, Data Analytics & Reporting, IVR Routing, Speech Analytics

CHALLENGE OVERVIEW

From Disjointed Paths to Omnichannel Journey

Like many companies shifting to hybrid and remote plans for their employees, iQ Credit Union found itself at a crossroads within their contact center. Leadership wanted to advance meaningful connections within their workforce and with members while creating an improved, omnichannel communication journey for all.

One of the biggest challenges iQ encountered was finding a realistic way to grant their contact center staff the ability to work remotely. With outdated systems that made communication difficult, dreams of working remotely while maintaining business continuity were fading quickly.

iQ was also looking to elevate their member experience (MX) with faster, more connected communications. Before partnering with Avtex, iQ's members and agents were experiencing friction in the contact center. iQ's loan application process involved back-and-forth communications between agents and members – resulting in lost employees and loans.

Realizing their current legacy system could not meet their needs, iQ Credit Union partnered with Avtex to establish robust contact center solutions that would create a frictionless experience.

THE SOLUTION

Enhance Communication Capabilities with Genesys Cloud

To update their member and employee experience, iQ Credit Union looked to Avtex for consulting services and expertise. First, a new contact center technology, Genesys Cloud, was implemented to replace their legacy on-prem solution. This switch better supported remote employees, which in turn enhanced the experience for iQ Credit Union members.

iQ Credit Union employees could now connect with – and reply to – members more quickly and easily, expediting the loan application process. The communication process was streamlined for both staff and members. iQ members receive texts from dedicated call center staff that provide updates on loan applications and pre-approvals in real time.



The move to the cloud also brought some unexpected positive benefits to iQ's business continuity plans. In the past, if the power went out at their main call center headquarters, all call center employees onsite would not be able to communicate with members. Now call center operations are split between two sites, and many employees are remote, making worries about connectivity a thing of the past.

Users were also able to pilot and test the new Genesys Cloud system. New iQ employees were trained in a test environment, creating an ideal training module where newly minted employees could familiarize themselves with the system without worry of accidentally disconnecting a member call or modifying pertinent member information. The Avtex team was also available for post-deployment support.

The iQ Credit Union team was most impressed with the consultants at Avtex and their commitment to clear communication throughout the planning and implementation processes. They cited close collaboration practices and quick ticket responses from consultants as positive experiences with this project. With a concise action plan, Avtex and iQ Credit Union were able to bring the dream of improved MX and EX of iQ members and employees into reality.



“What stood out about Avtex was that they took the time to listen to our answers. Their proactive approach was phenomenal. When it came time to deliver the product, it had everything we were looking for. Their communication made us feel like we were part of the team and not alone.”

Ali Migaki | SVP/Chief Retail Officer at iQ Credit Union

THE RESULTS

Frictionless Experience for Agents And Members

For the members of iQ Credit Union, the transition to Genesys Cloud package was seamless, just as Ali Migaki, SVP/Chief Retail Officer at iQ, and her team had planned. Members didn't notice the shift, which is what they wanted for a frictionless experience. iQ Credit Union also increased staff satisfaction. Working remotely was something that the credit union had not enabled for contact center staff prior to the COVID-19 pandemic. Leadership has since given remote work the green light, especially since happy employees translate into happy members.

Erin Nikkila, Lending Contact Center Manager at iQ, said, "Having our contact center staff work from home was a first for our organization. It was a great milestone. It's nice to see the joy that it's created for our staff, and I know it's going to be a huge part of our employee retention strategy."

FUTURE PLANS

Improve Knowledge and Expand Video Banking Solution

Next on the horizon for iQ Credit Union is knowledge base (shelf IO), and video banking solutions from Avtex in phase two of the plan over the next three to five years. The ultimate vision for iQ's transformation is to equip staff with simple, effective, and efficient resources to enhance the member experience. Leadership wants to continue to empower staff with effective solutions where members come away thinking, "wow, iQ made that really easy." iQ strives to meet members where they are, whether that's in an iQ branch, over the phone, or through video banking with 1:1 personal care as top priority.



About Avtex

Avtex, A TTEC Digital company, is a full-service Customer Experience (CX) consulting and solution provider focused on helping organizations create better experiences for their customers. With an unparalleled breadth of knowledge and experience, and partnerships with leading technology vendors like Microsoft and Genesys, we are uniquely suited to address any CX challenge.

Our portfolio of solutions and services supports our unique approach to Customer Experience, which includes two key phases to achieving CX Transformation.

Our CX Design solutions and services aid in the process of defining and improving CX. From journey mapping to CX design thinking, we provide the support you need to set the foundation for CX success.

Our CX Orchestration solutions and services enable the realization of your CX strategy through people, processes and technology. From technology implementation to training, we ensure you have the capabilities to execute your CX strategy