Panviva
upland

Case Study

4Front Credit Union transforms the member experience with Panviva

4front credit union

INDUSTRY

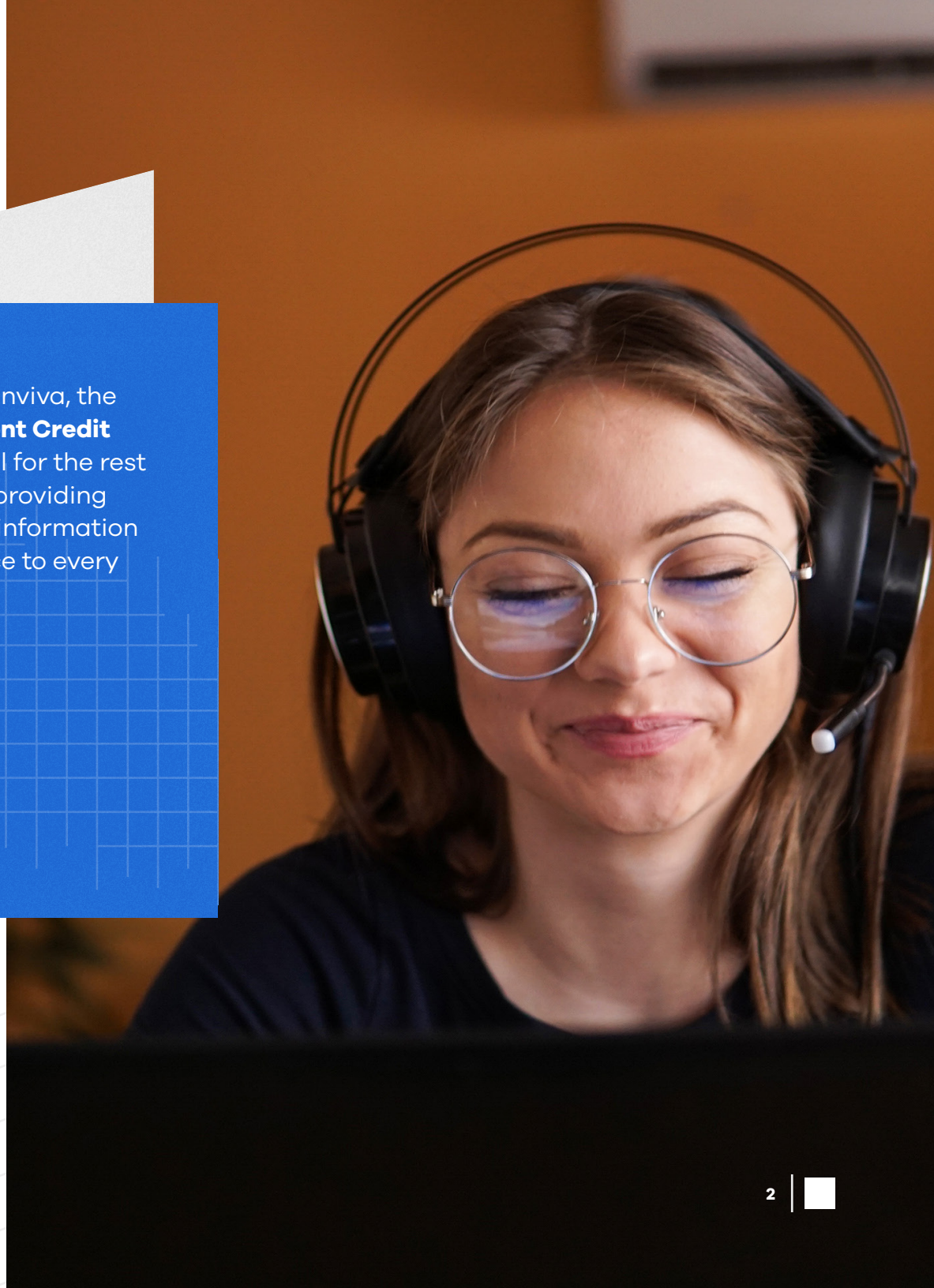
Financial Services

COMPANY

4Front Credit Union
Traverse City, MI
4frontcu.com

4Front Credit Union is a member-owned financial cooperative serving more than 88,000 members across the state of Michigan.

After implementing Panviva, the contact center at **4Front Credit Union** became a model for the rest of the organization in providing consistently accurate information and exceptional service to every member.



How do you find the right knowledge management system for your needs?

A lack of well-documented processes left employees unsure of how best to service its customers.

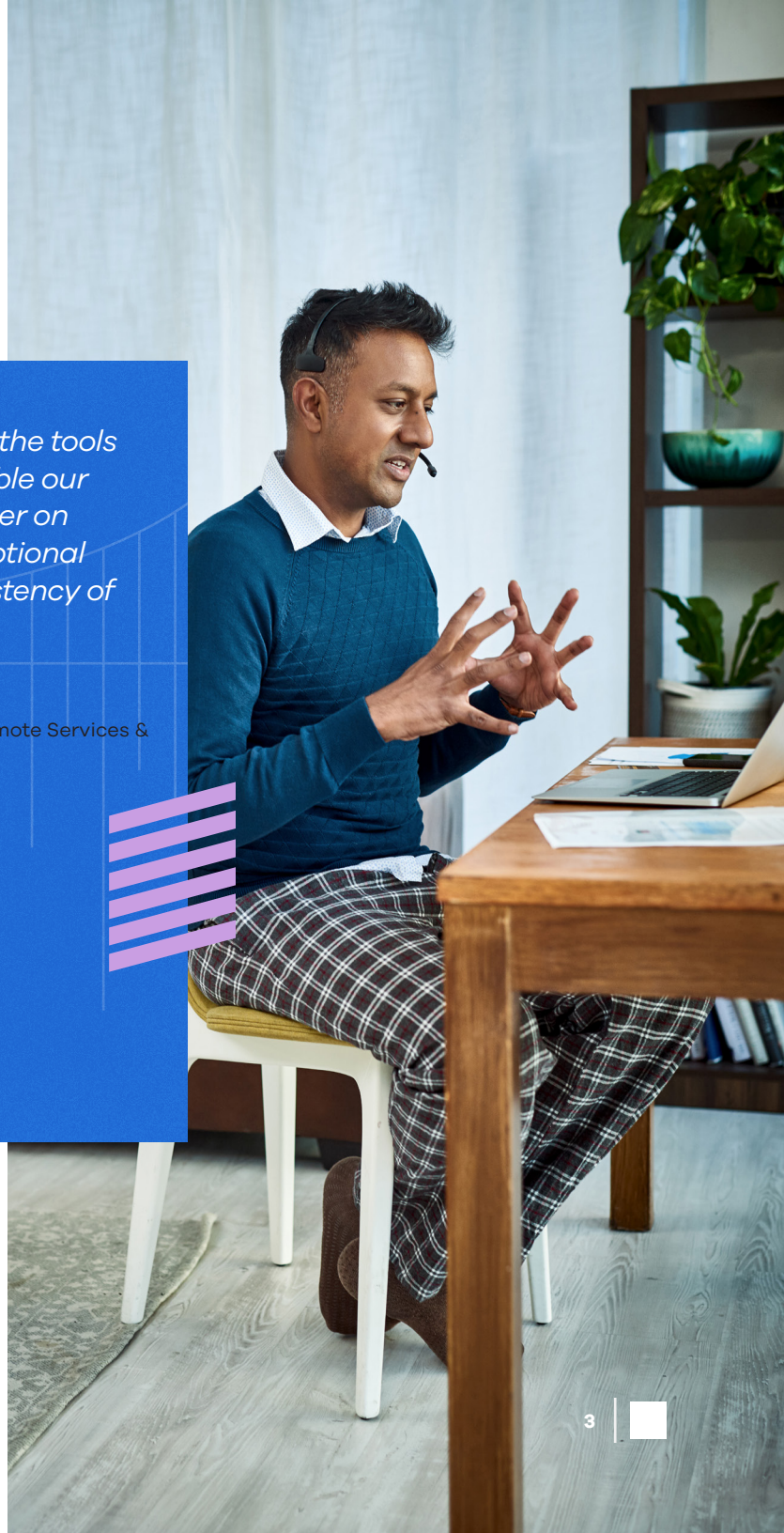
Members endured long handle times for calls that should have been relatively easy to handle, and were often told, "you need to come into the branch." Members who preferred the call center as their service channel were frustrated that they couldn't receive the answers they needed.

Panviva clearly documents processes and makes knowledge easy to find and use.

It was clear to the Contact Center Manager, Zach Eychaner, that 4Front needed a knowledge management solution that would help meet the goals of exceptional and consistent member service. One of the solutions they looked at was better known in the industry but Zach had previous experience using it and knew it was less than stellar. Knowing a poor user experience would result in a poor member experience, the search continued until 4Front found Panviva, whose user-friendly methodology resonated from the start. Since implementing Panviva, 4Front has experienced enormous success.

"Panviva provided the tools we needed to enable our call center to deliver on initiatives of exceptional service and consistency of delivery."

– Zach Eychaner
Senior Vice President, Remote Services & Technology



Building customer loyalty through exceptional member experiences

Focus on meaningful conversations.

While 4Front tracks Average Handle Time (AHT) to identify areas for improvement, they don't use it as a direct KPI metric for agents. Ensuring that all member needs are met is more important than rushing them off the phone. Call volume increased as members started viewing the call center as a viable option. First call resolution (FCR) is now meeting SLAs and hold time has decreased dramatically since agents can now easily find information.

Call center gained prestige.

Call center promotions have increased, which has become a point of pride within that group. Whether promoted to supervisory positions in the call center or to lending and branch positions, they have been found to be the most competent and best prepared for interviews. As a result of using Panviva, they're empowered to better self-serve, a huge plus in helping them adapt to their new roles.

Impeccable time-to-competency.

Since information is easily accessible through guided workflows in Panviva, new agents no longer need to memorize knowledge and they start handling calls in two weeks. Trainers now focus on soft skills around call handling and upselling. Out of approximately 20,000 calls per month, agents are now initiating more than 6,000 referral opportunities.

Other departments came knocking.

The call center's improved performance and results got the attention of the rest of the organization. Now, Panviva has been rolled out to every department and employees quickly access the information they need, including company-wide information such as job postings, org charts, employee handbook, and so on.

4Front plans to expand the use of Panviva to leverage their existing content over other digital channels. Potential use cases include integrating with their website and providing responses for a chatbot to allow members to better self-serve.

Unexpected value during COVID-19.

As branches shut down during the pandemic, calls increased by 300%. Branch employees were given access to call center content and helped support the calls seamlessly. Panviva not only helped the team handle the increased call volume, but also helped make sure 4Front was able to keep everyone employed during those difficult times.

Results for 4Front Credit Union

Increased FCR

Faster time-to-competency

Shorter hold times

Improved member experience

Upland helps global businesses accelerate digital transformation with a powerful cloud software library that provides choice, flexibility, and value. Our growing library of products delivers the "last mile" plug-in processes, reporting, and job specific workflows that major cloud platforms and homegrown systems don't provide. We focus on specific business challenges and support every corner of the organization, operating at scale and delivering quick time to value for our 1,700+ enterprise customers. To learn more, visit www.uplandsoftware.com.

upland
Panviva

For more information visit: https://uplandsoftware.com/panviva/