

Case Study

**Central One
Credit Union
streamlines
operations using
Upland Panviva**



INDUSTRY
Financial Services

COMPANY
Central One Federal Credit Union

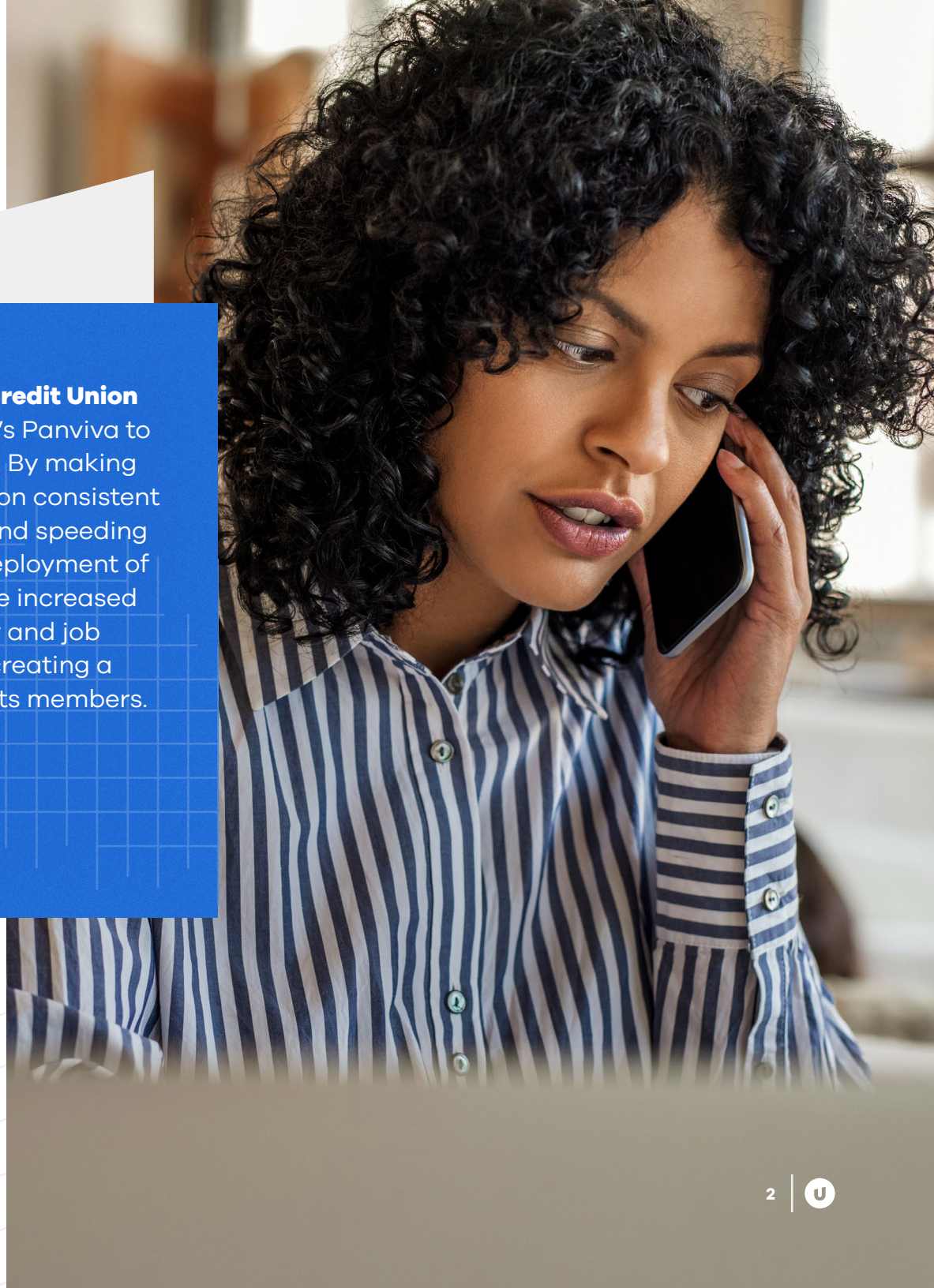
Shrewsbury, MA
centralfcu.com

Since its founding in 1952, Central One Federal Credit Union has grown into one of the largest federal credit unions in Central Massachusetts and offers a full range of deposit and lending products.



Central One Federal Credit Union

used Upland Software's Panviva to streamline operations. By making content and information consistent across departments and speeding up the system-wide deployment of processes, Central One increased employee productivity and job satisfaction, all while creating a better experience for its members.



How do you modernize a fragmented, unwieldy database?

Central One needed to modernize.

After years of compiling changing policies, processes, and regulatory requirements, Central One was confronted with a fragmented and complex database of information that was difficult for call center and retail banking staff to handle. They began to look for a solution that would provide a centralized data repository, and, most importantly, that helped call center staff to streamline procedures and revise out-of-date forms.

It was time to take a fresh look at the big-picture, as well as the day-to-day.

Panviva afforded the team at Central One the chance to take a step back and make major improvements to forms and processes. By streamlining their complex database and more quickly deploying processes system-wide, the Central One team has empowered its agents to focus on what they do best: providing great customer experiences.

"Panviva has reduced errors and keeps people accountable. Members are happier. Things are getting done right the first time."

– Christine Bates
Assistant Vice President



Content and information are consistent with Panviva.

Minimal IT meant a smooth implementation.

To implement Panviva, Central One concentrated on the top 20 pain points felt by their staff. For assistant vice president Christine Bates and her associate project manager Sandy Dunay, the entire Panviva team from sales to support was easy to work with. Especially simple were Panviva's low IT installation requirements.

"From a project POV, the fact that Panviva is cloud-based with minimal IT needed—that was a breath of fresh air," Bates said.

After a number of rolling releases to their users, Bates said Central One saw great results almost immediately.

With form confusion out of the way, reps can focus on serving members.

One of the most critical areas addressed by the move to Panviva was the change in the member death notification form and processes. Front line staff were concerned about making sure they said and did the right thing when it came to assisting grieving members. Now, with a more streamlined system guiding them through the process, agents can focus on offering empathy and reassurance, not just trying to figure out what they need to do with the form.

Death notification was just the first step in the evolution. Using Panviva, Central One has evaluated and changed many of its most-used forms, making it easier to

change members' addressers, ownership user designations, and more.

"We learned that we needed to take a real hard look at what we had and ask: Do we really need to save this form?" says Bates. "Once we made the changes, we heard from frontline staff: 'Thanks. We really hated that form.'"

In getting Panviva up and running, Central One has seen improvements across the board. Behind the scenes, updates and processes run more smoothly, which empowers agents to do better, more satisfying work. All this translates to better member experiences for anyone who calls the credit union.