



## Case Study: The Forecast Is Bright for Pelican State Credit Union and Total Member Care

### Introduction

To help credit unions meet their members' expectations for high-quality, personalized and anytime service PSCU launched Total Member Care (TMC) contact centers. Now more than 160 credit unions have enrolled in TMC, delivering after-hours and overflow assistance, as well as a wide and constantly evolving set of services and staffing support. In addition, TMC call center agents are also trained to boost revenue through collections, loan applications, outbound calling campaigns and cross-selling of additional financial services. At a time when credit unions are going head-to-head with larger financial organizations, a call center is an essential member service and a strategic investment. How different credit unions initiate a call center upgrade can vary. In the case of Pelican State Credit Union, Mother Nature played a significant role.

### Challenge

It had become clear to managers at Pelican State that the advantages of a remote call center were worth exploring. In 2016,

Jon began researching various call center companies to see which could be a good fit for Pelican State Credit Union. The process was going smoothly and PSCU had just made a strong first impression when disaster struck. In August, a flood overtook the Baton Rouge area, the second largest in the state's history. The severity of the flood forced several branches to close for the week. With employees unable to get to their call center, Pelican State needed a way to assist members with their financial and recovery inquiries.

### Solution

Jon got in touch with PSCU staff to see if there was any way they could help. The two groups outlined and organized a strategy to help restore access for members. The credit union had no formal business arrangement yet, but PSCU knew it was the right thing to do. For the next few days, the TMC call center agents were able to take members' calls then email those incoming questions to an email box that Pelican State could access and use for quick responses, creating a vital link to help families

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and the community, recover faster. All but the most complex or confidential matters were expertly handled by the remote TMC team.

Satisfied with PSCU's performance and quick responses, Pelican State made the decision to go with TMC as their outsourced call center.

## Outcome

In January 2017, TMC was integrated with Pelican State's technology and business processes and the services partnership was launched. The credit union counts on TMC supplemental call handling and member inquiries after hours, for overflow demand and on weekends and holidays. Another important benefit of using the TMC call center is that it allows branches to route calls during training sessions, meetings and social activities so that everyone can participate without being interrupted. TMC also has access to Pelican State's own forms and documents, allowing TMC service specialists to provide complete resolution to a majority of members' inquiries and requests.

Jon was impressed with the easy implementation of all aspects of the service, driven by PSCU's years of experience and continuous communications. "The implementation process was the easiest one I've been through. PSCU was very timely and provided good communication," stated Jon. Pelican State Credit Union was

delighted when the PSCU implementation team was able to stay ahead of schedule and meet the client's ambitious deadline.

When asked about the effect of having the additional support from TMC in their call center, Jon said, "TMC has reduced the pressure on our staff to hit our call center service level while still maintaining excellent member service. Knowing TMC is available for overflow eases this pressure, and our employees are thankful for that. We don't want to have one member suffer just so another member's call is answered."

Since the partnership was formed, PSCU's TMC call center also supported Pelican State through two rare winter storms that closed all the state branches and the corporate office. TMC was able to keep the lines of communication open and support Pelican State's members.

It took a perfect storm to bring Pelican State Credit Union and PSCU together, but the affiliation has not stopped paying off. Members and prospects are getting the services they need, while staff and managers know that TMC has their backs rain or shine.

For further discussions, including a no-cost analysis of your current call center situation, call PSCU at 844.367.7728 and select Option 1.