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# Credit Union Contact Center Resiliency Survey Results 2020



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# About this Survey



Strategic Contact conducted this survey to learn what credit union contact centers experienced during the coronavirus crisis, how they responded, and what they will do differently going forward.

This deck was created to facilitate a roundtable discussion with CU leaders based on the survey results. It includes some commentary by Lori Bocklund, President, Strategic Contact.

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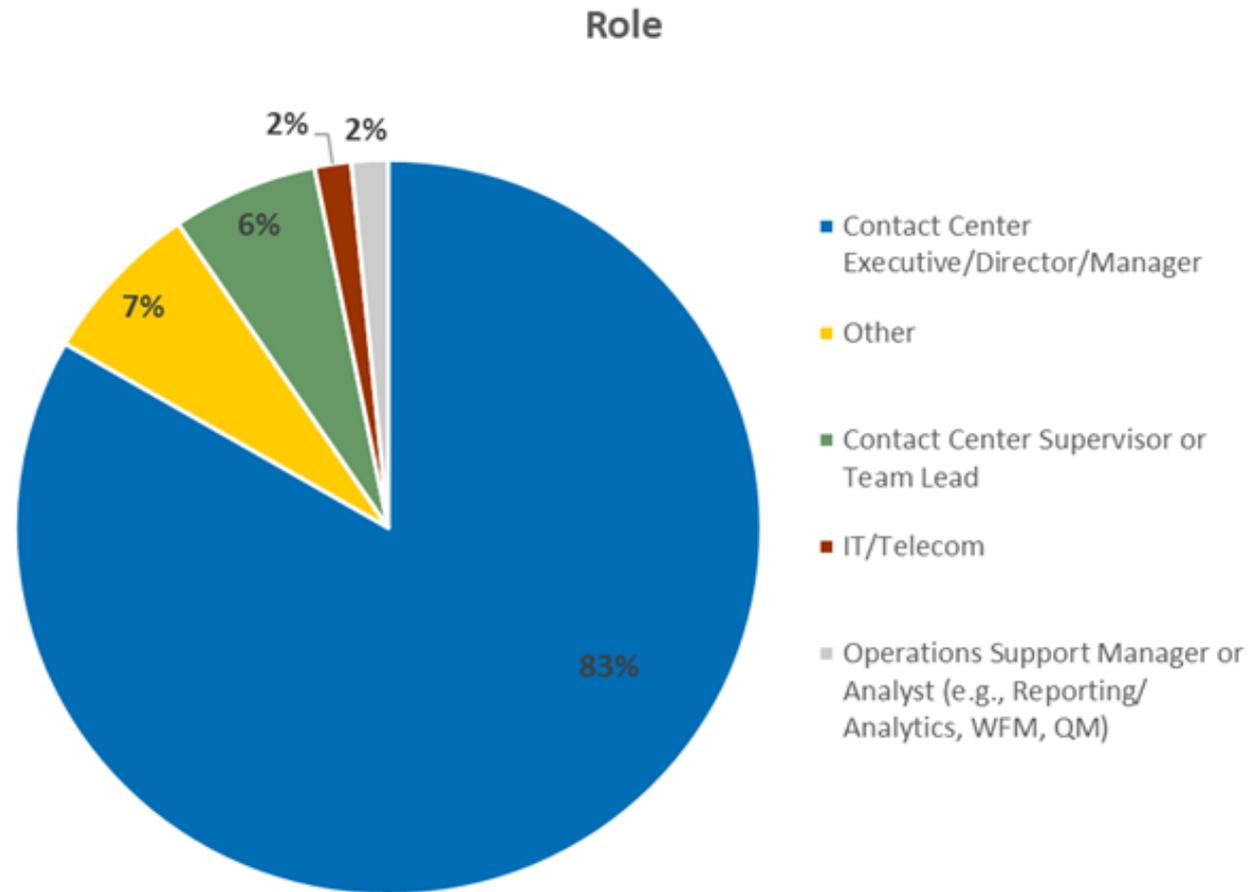
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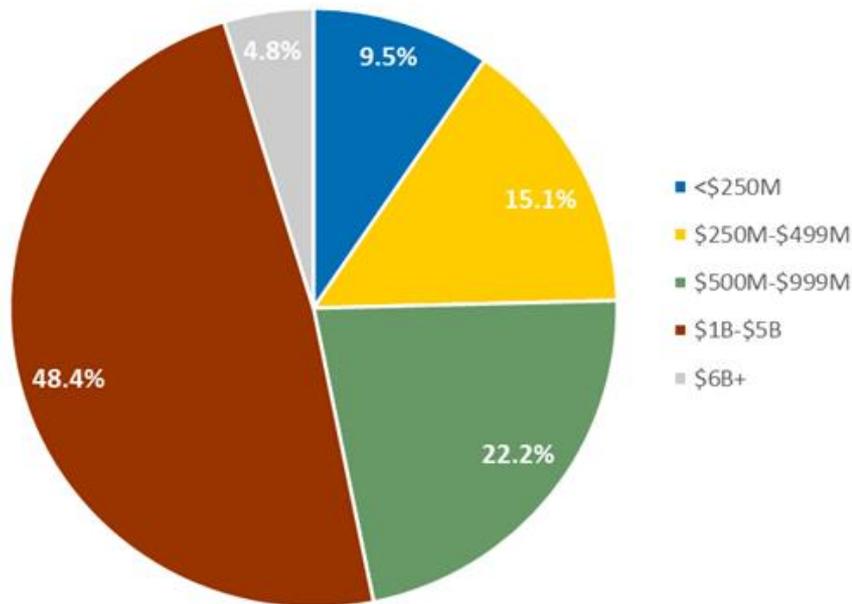
# Participant Demographics

# Participant Role

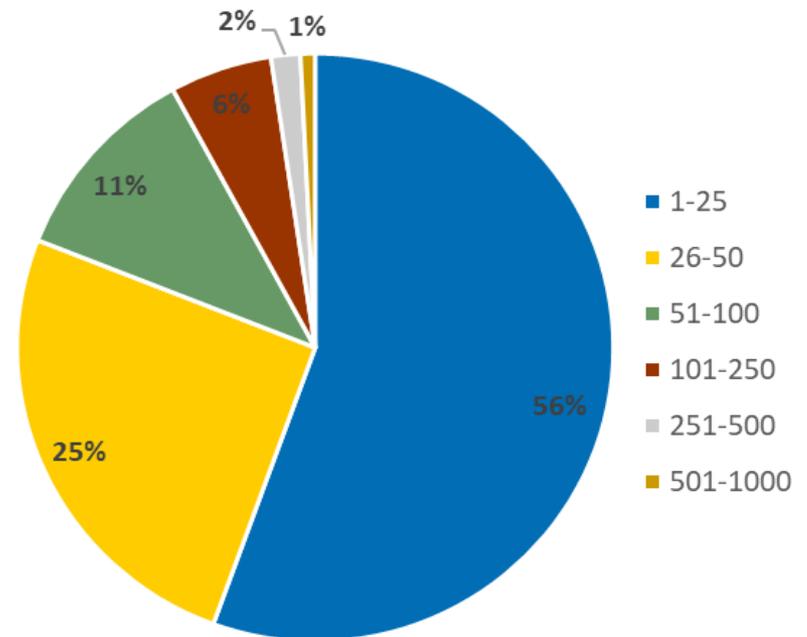


# Credit Union Asset Size and FTE

Credit Union Asset Size



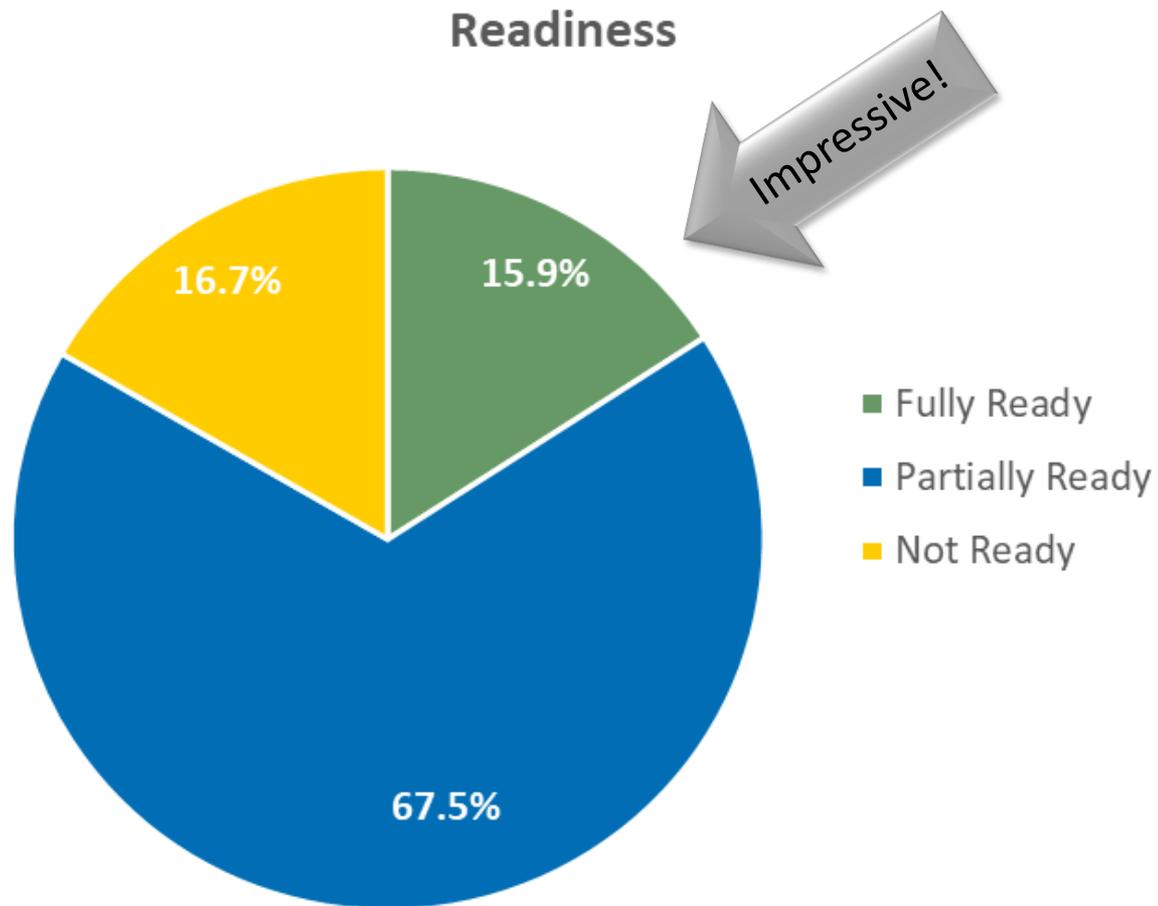
FTE



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# Results

# Were You Ready?

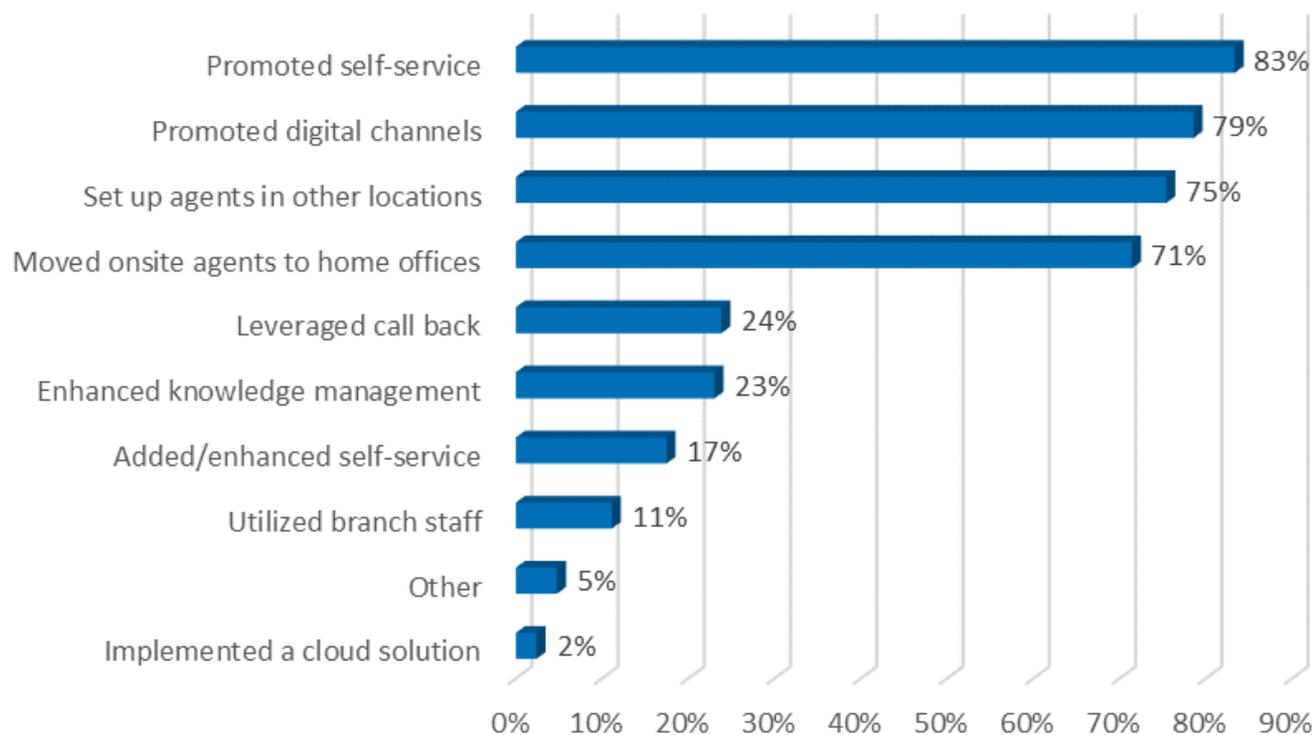


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# Response

# What Did You Do?

## What actions did you take to handle volume and keep agents safe?

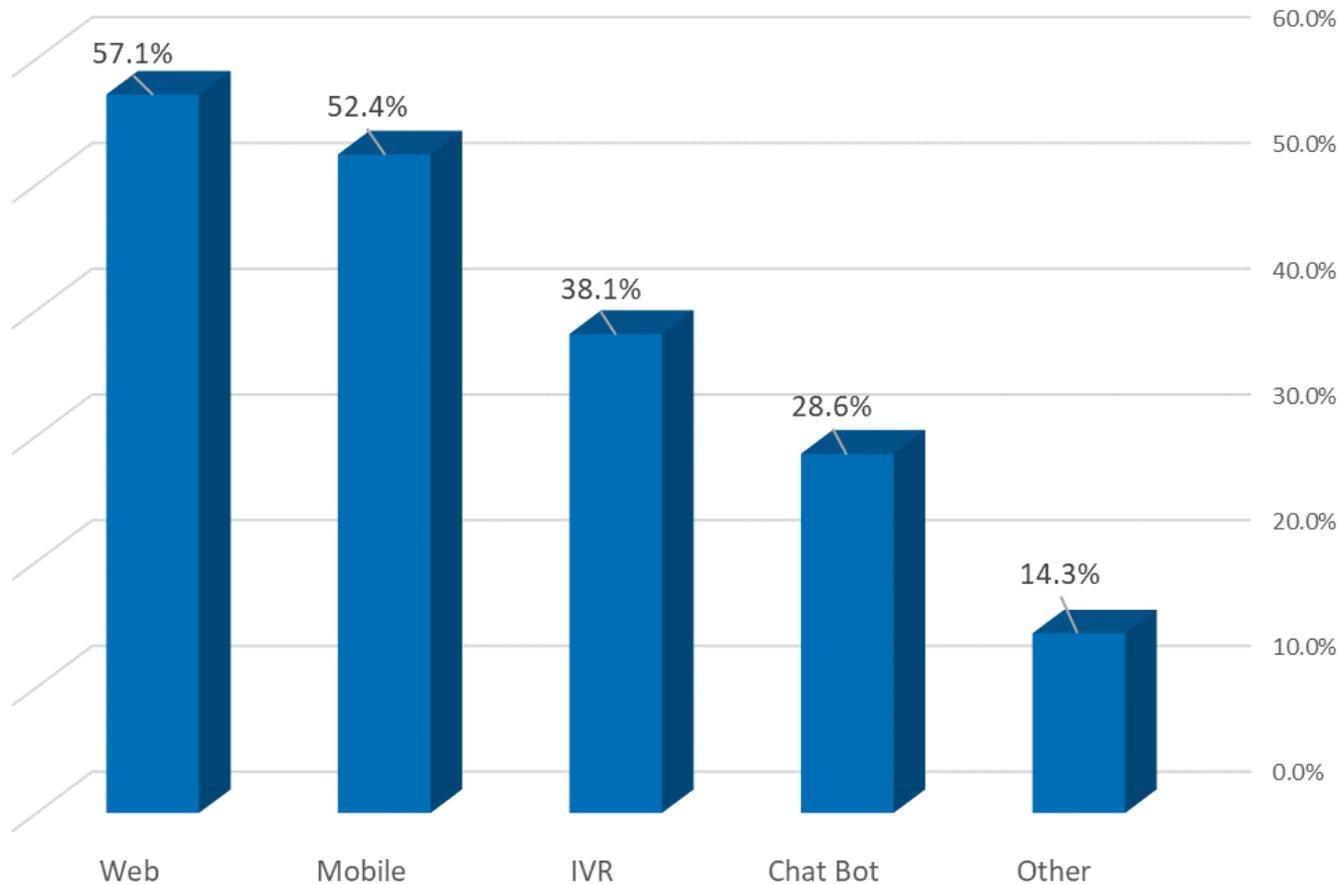


Clearly these actions “saved the day”

# Of those who added/enhanced Self-Service...

What self-service did you add/enhance?

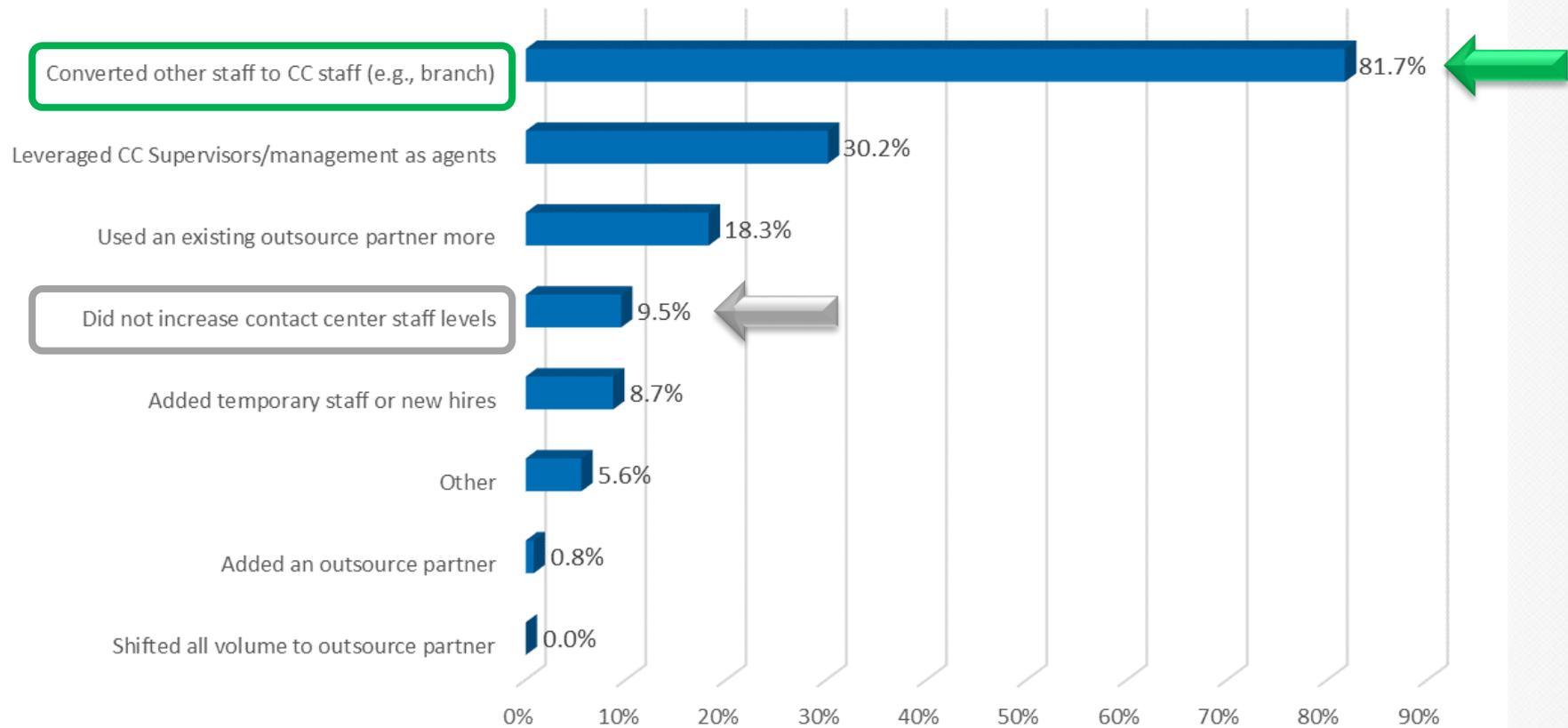
What do you think drove the focus on *digital* channels? Speed, ease, demand?



Interesting!

# What Did You Do to Increase CC Staff Levels?

What did you do to increase contact center staff levels?

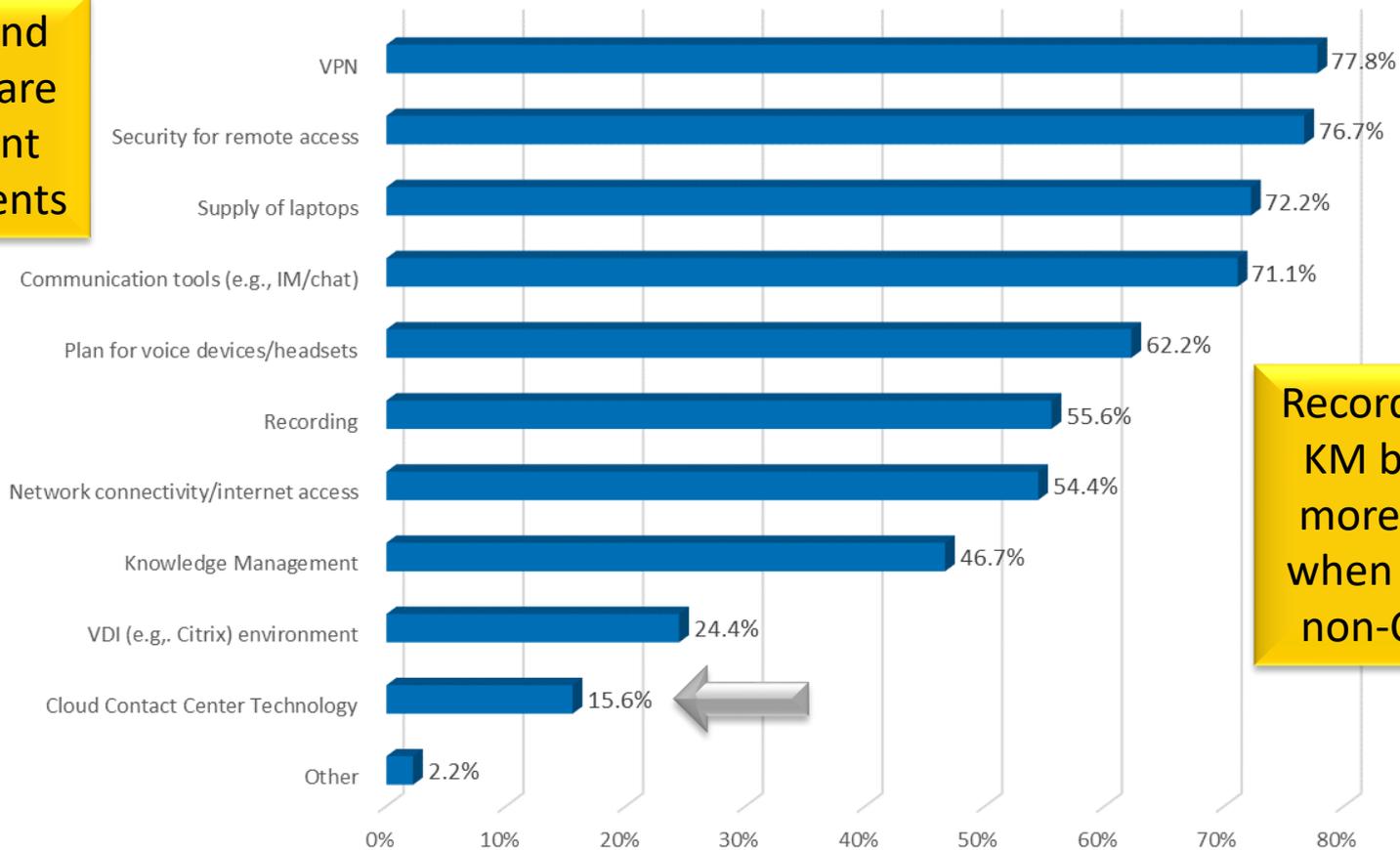


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# Home Agent Support

# Which Elements Did You Have in Place to Support Home Agents?

Which elements did you have in place to support home agents?



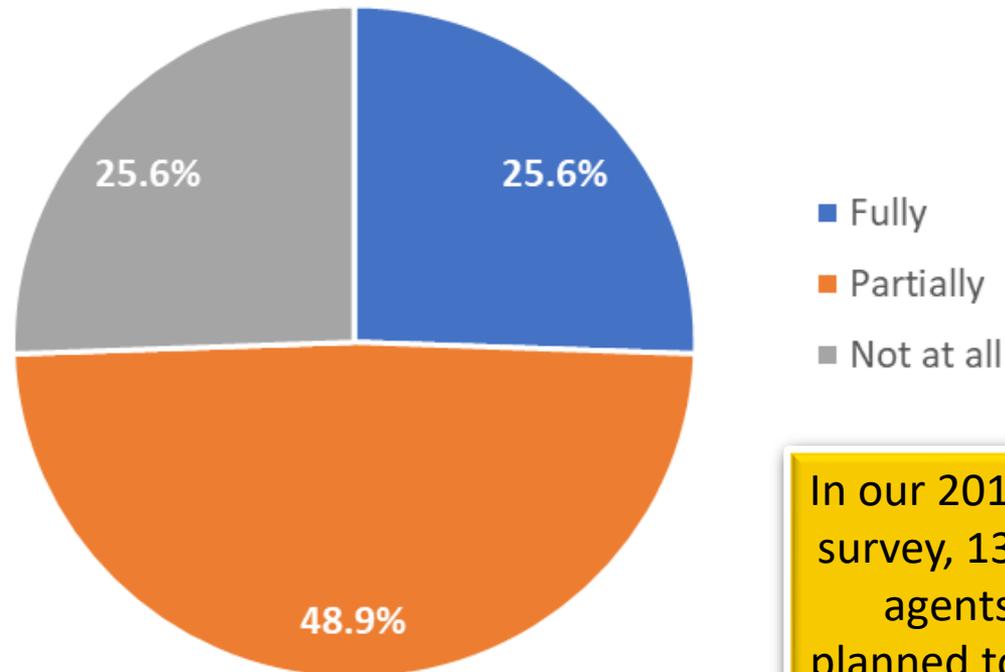
Access and Security are important for all agents

Recording and KM become more critical when tapping non-CC staff



# Did You Have the Policies and Processes for Home Agents Ready to Go?

Did you have the policies and processes for home agents ready to go?



In our 2017 benchmark survey, 13% had home agents and 19% planned to have home-based agents

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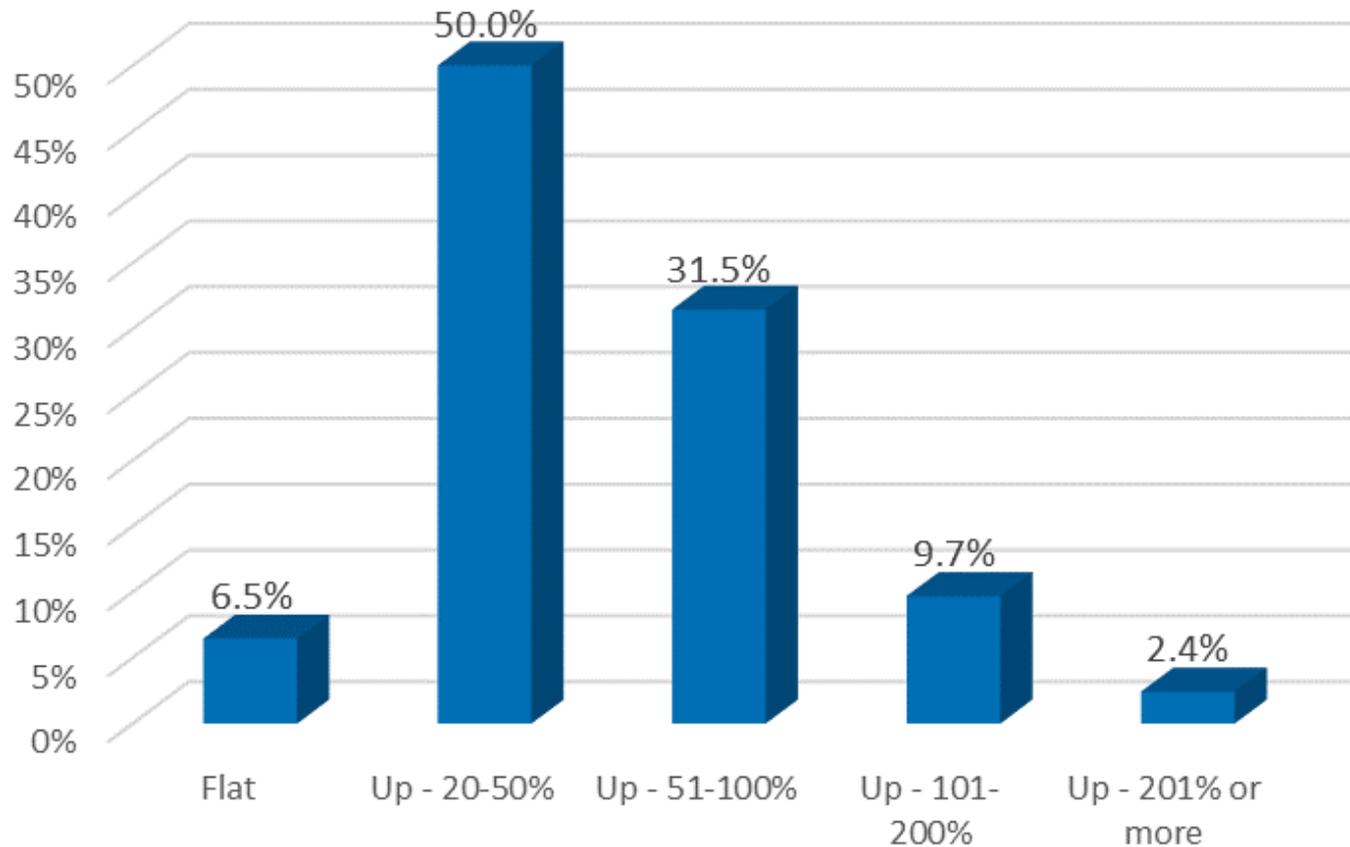
# Impact

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# Workload

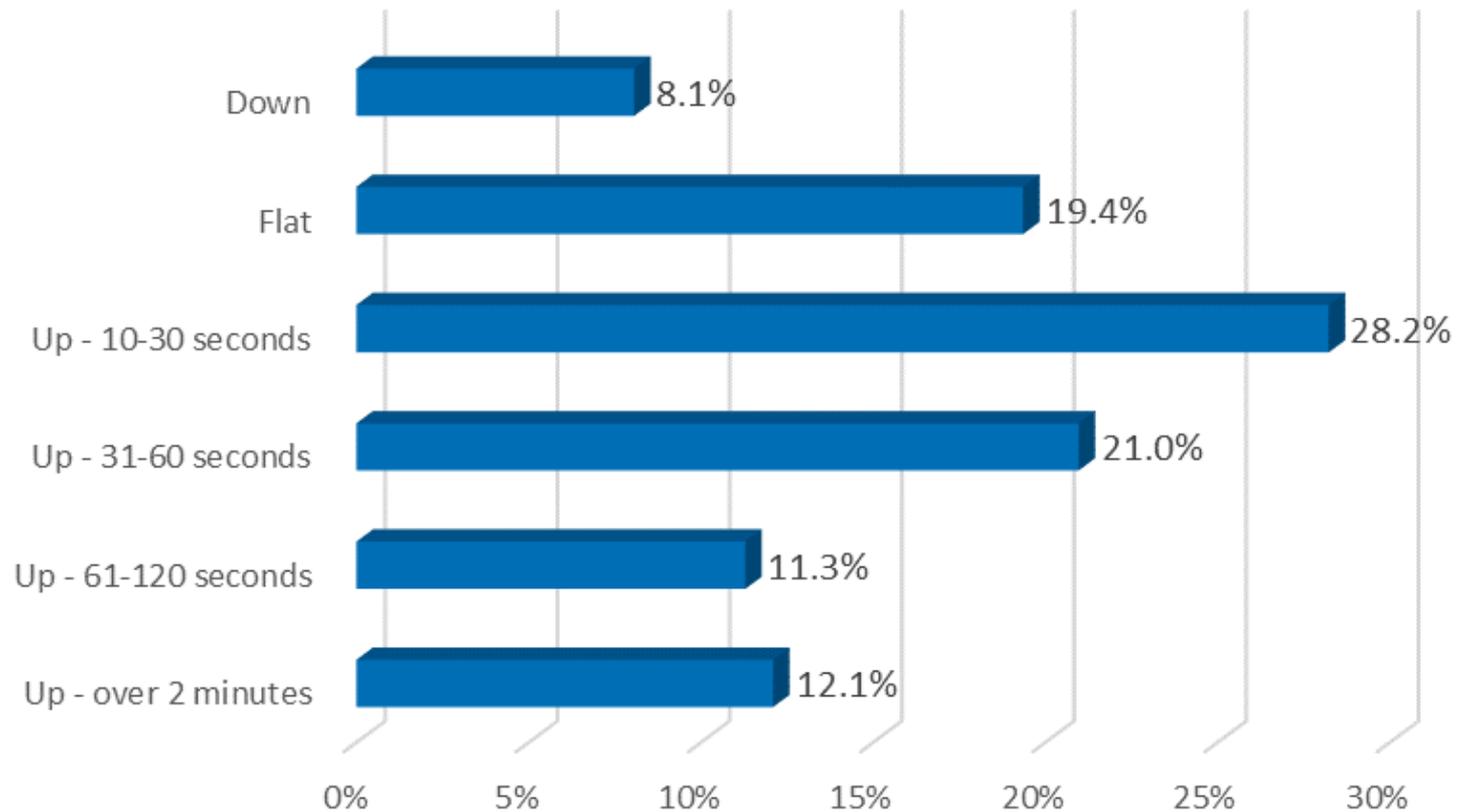
# Volume

On average, how has your volume changed since the start of the Coronavirus?



# Handle Time

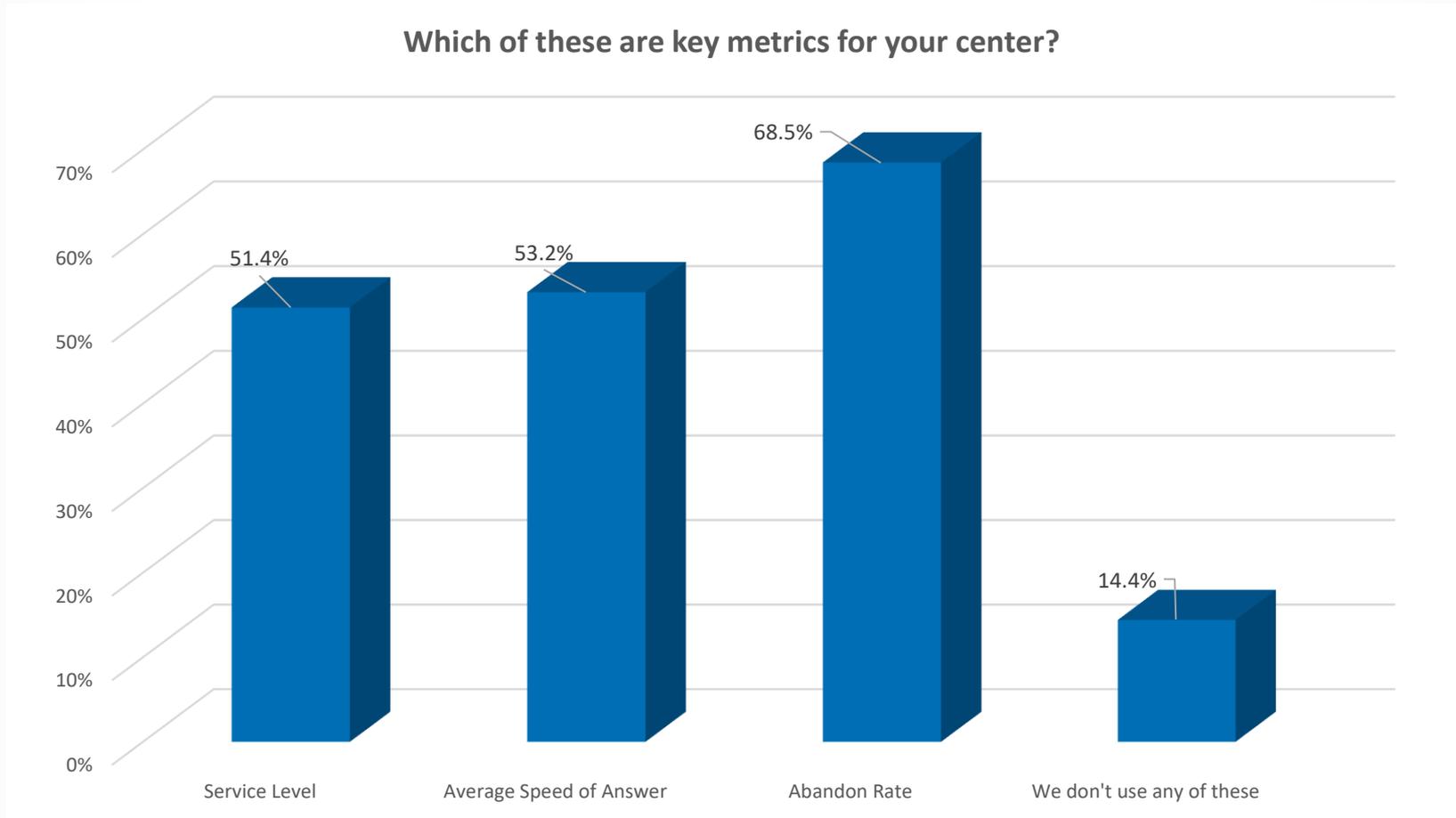
On average, how has your handle time changed since the start of the Coronavirus?



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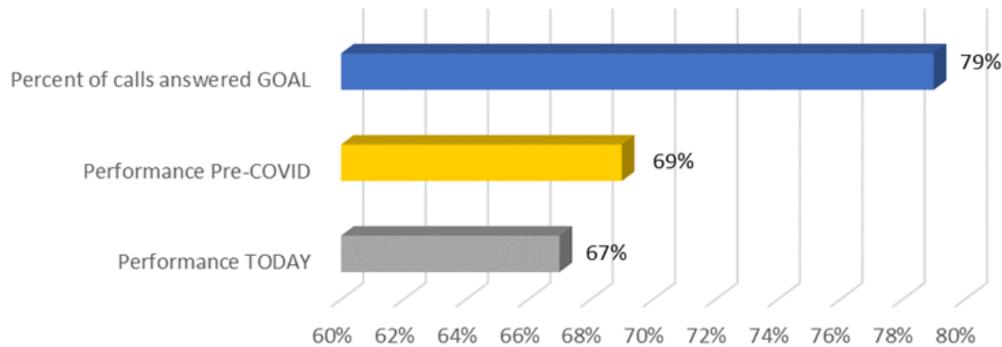
# Metrics

# Key Metrics



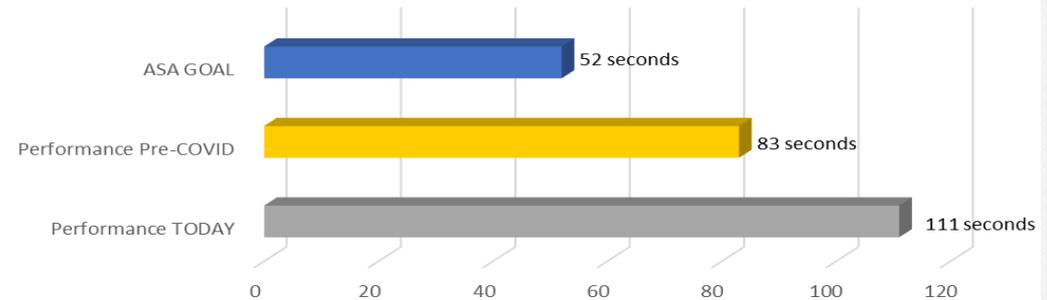
# Performance

### Service Level - Average Percent Answered in Target 49 Seconds

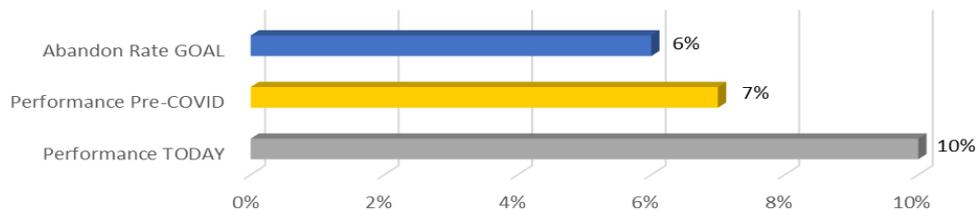


Smaller centers (up to 50 agents) were more significantly impacted

### ASA - Average Speed of Answer



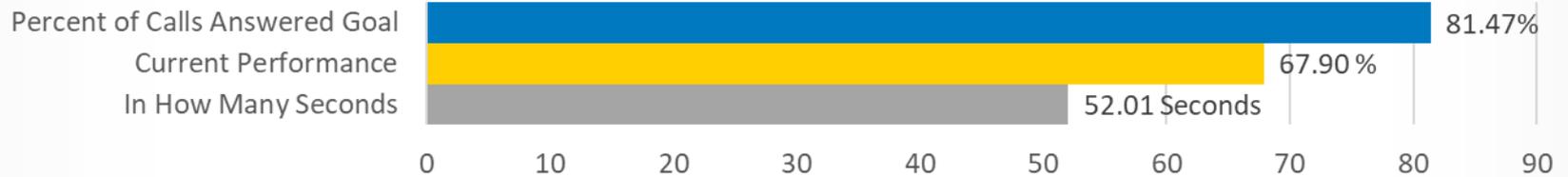
### Abandon Rate



# Reference: Performance from 2017 Benchmark Survey

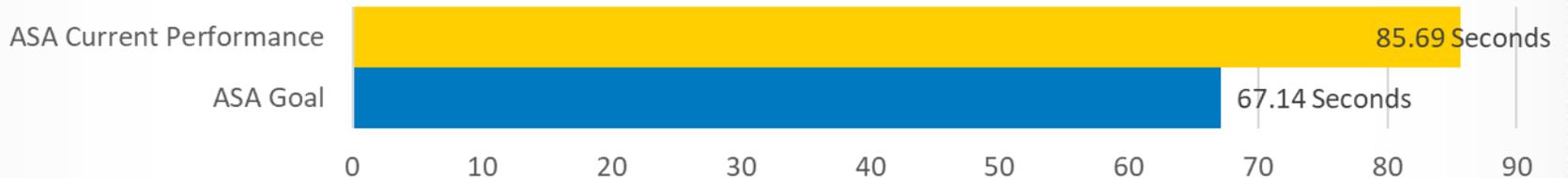
## Service Level

### Overall Average



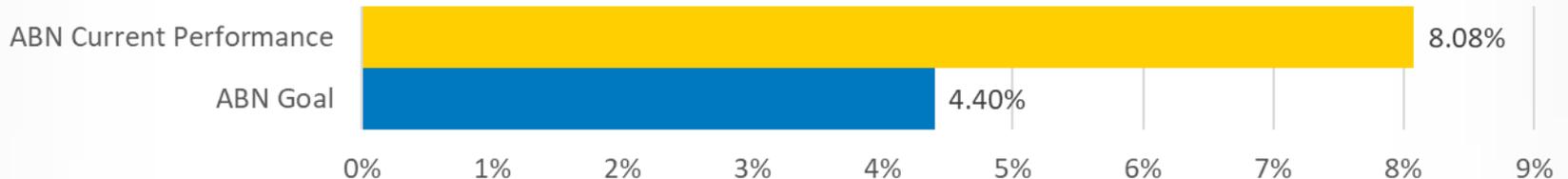
## ASA

### Overall Average



## Abandon Rate

### Overall Average

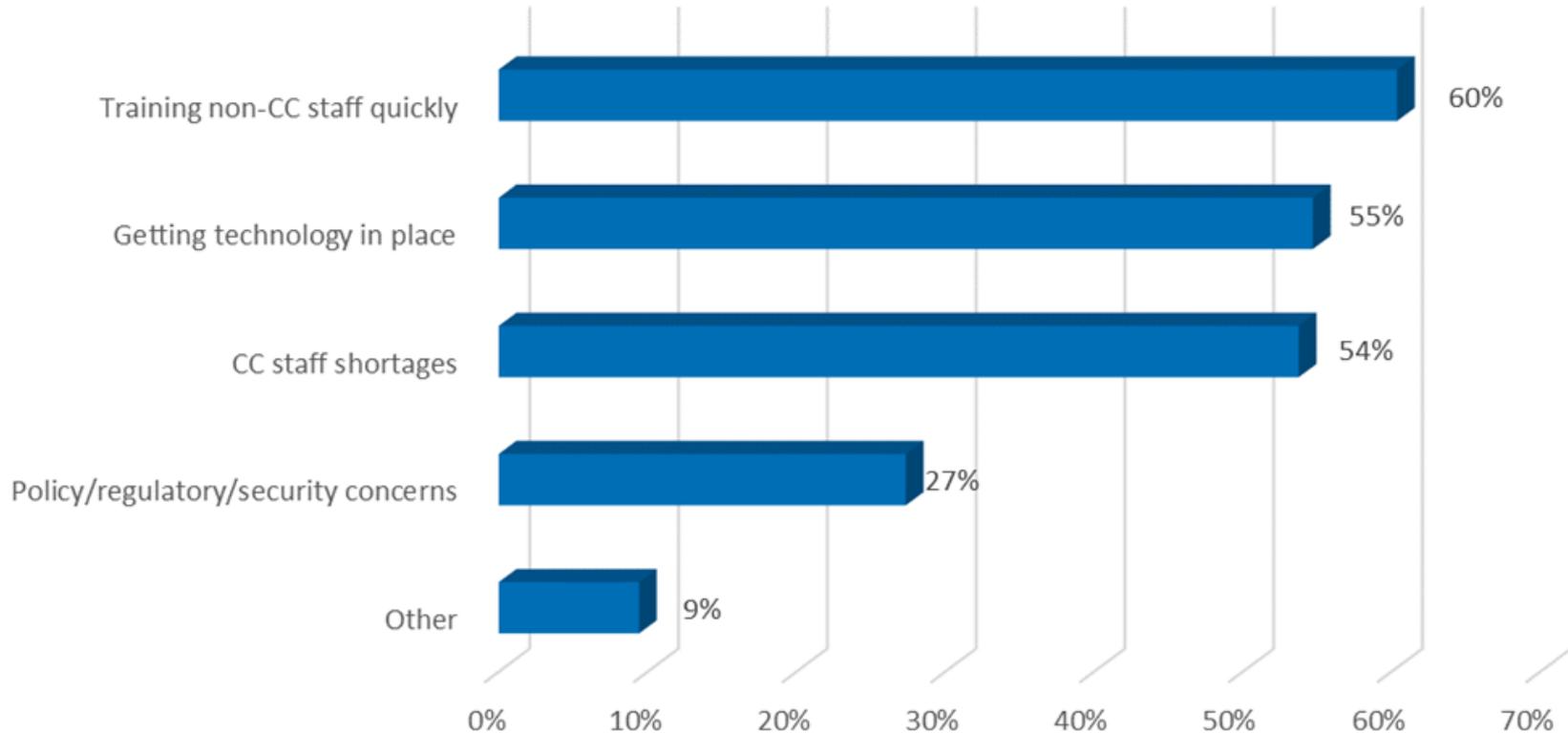


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# Challenges and Plans

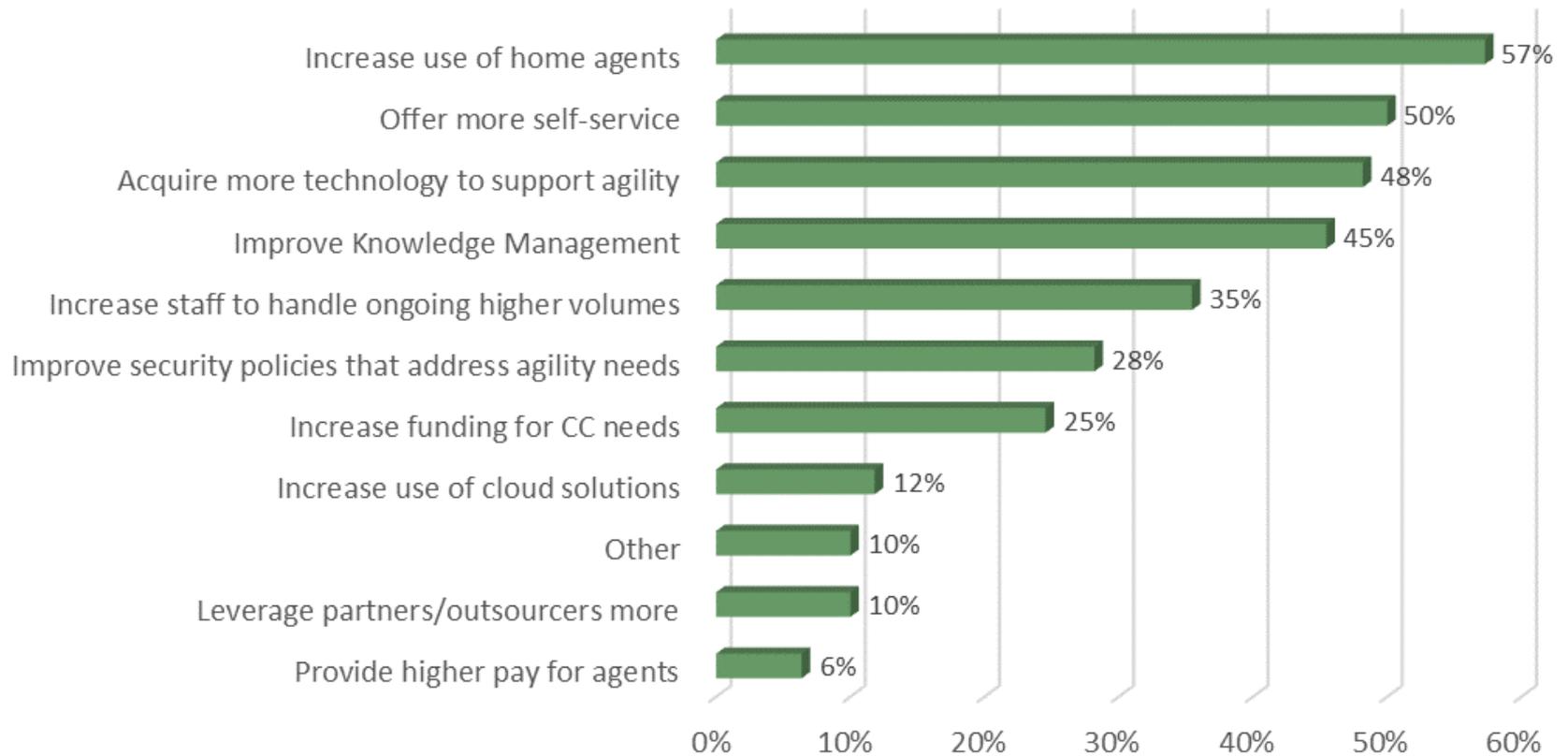
# Challenges

## Coronavirus Challenges



# Plans

## Plans Going Forward



# Where Do You Go From Here?

## Assess How Your Response Went

- How “ready and resilient” was your center?
- Compare your actions and impacts (staff and members!) to your peers
- Identify issues/gaps that you must address to be ready for future events

## Develop/Update Your Resiliency Plan

- Define details of how to respond to various scenarios (see starter)
- Define priorities for additional capabilities to improve resiliency and reduce risk
- Leverage this study to help justify the changes and investments ahead

## Pursue Improvements to Benefit Your CU and Members!

- Tie resiliency planning into future project priorities
- Work collaboratively with other departments, including HR and IT
- Take a holistic approach considering people, processes, and technology

Got a question our survey results didn't answer? Whether your curiosity is about what the data tells us, “slicing and dicing” it in different ways, or adding questions to future surveys, we would love to hear from you. Send us a note at [CUCCsurvey@strategiccontact.com](mailto:CUCCsurvey@strategiccontact.com) and tell us what you want to know!

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# Thank You to Our (Current and Future) Participants!

*A very special thanks to our survey participants!*

Strategic Contact would like to thank the participants of this survey. Your input will help credit unions reflect on how they responded to the coronavirus crisis in their contact centers and consider what they may do going forward to ensure resiliency and responsiveness to take care of their members and staff.

Watch for additional survey invitations and results as we all move forward in pursuing a great member experience and efficient and effective service delivery.

Visit <https://www.strategiccontact.com/contact/> to register for future survey participation and results.

**Strategic Contact is an independent consulting firm focused on contact centers.**

Our projects help clients address people, process and technology challenges and align contact center operations and technology with business objectives. Our consultants are industry thought leaders, averaging over 25 years of experience.

**Strategic Contact works extensively with credit unions of all sizes.**

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# Reference Material

- We have articles and blog posts on resiliency plans
  - Articles - <https://www.strategiccontact.com/publications/>
  - Blog - <https://www.strategiccontact.com/blog/>

The survey results can be found here:

<https://www.strategiccontact.com/survey/cu-resiliency-survey/>

And if you need a starter for your resiliency plan, you can find one here:

<https://www.strategiccontact.com/tools/resiliency-plan/>

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From inquiries on members' payment card and deposit accounts to lending services, contact centers extend a credit union's ability to serve its members. PSCU Contact Center Services & Solutions encompasses a wide scope of service capabilities and growth opportunities available to all Owner credit unions through 24/7/365 contact center support.

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