

Case Study

Evangelical Christian Credit Union

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Summary

Evangelical Christian Credit Union (ECCU) is a member-owned financial cooperative serving evangelical organizations and individuals worldwide. Headquartered in Brea, Calif., with a regional office in Colorado Springs, Colo., ECCU has total assets under management of more than \$2.3 billion. It has 1,800 corporate relationships and serves more than 8,000 consumer households in the United States and 110 countries around the world.

Founded in 1964, the organization serves the financial needs of evangelical churches, Christian schools, ministry organizations, and mission sending agencies. Quality communications and customer service are integral to ECCU's operations. The credit union worked with Siemens to implement a new communications system that delivers improved service and greater efficiency.

Challenges

- Providing effective voice communications and messaging for staff, members and others
- Delivering contact center capabilities such as faster response times and first-call resolution, to improve services to members
- Offering wireless communications capability for mobile workers

The solution:

- HiPath 4000 with HiPath Xpressions
- HiPath ProCenter Advanced
- Wireless solution and optiPoint WL2 Professional wireless VoIP phones

Top benefits

- Easily scalable system that will support a growing number of users
- Integration of a branch office phone system in Colorado Springs, Colo., resulting in more consistent operation and easier support
- More accurate and efficient routing of incoming calls to the appropriate contact center agent
- Fifty percent reduction in call transfers at the contact center
- Secure wireless communications enable campus-wide mobility
- Cost savings as a result of improved efficiencies

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A member of the ECCU technical staff who manages the relationship with Siemens.

Evangelical Christian Credit Union

Evangelical Christian Credit Union is focused on being the banking resource for Christian churches, schools, mission agencies and other evangelical ministries. ECCU also provides banking services to missionaries in more than 110 countries.

Effective communication systems are essential to ECCU. To that end, ECCU in 2003 set out to significantly upgrade its phone system with the latest technology. At the time, the credit union had an aging phone system that had reached capacity.

Time for an upgrade

With a growing staff, ECCU needed to implement a system that would allow it to add more lines to accommodate growth. One possibility was to upgrade to a new system from the existing vendor. ECCU considered that option and also evaluated solutions from other vendors.

The credit union was looking for a communications solution that not only would support a growing number of users, but also provide the sophisticated call management features ECCU was looking for, says Alan Weisenberger, Vice President of Technology Services. One objective was to implement skills-based routing in ECCU's contact center, so that incoming calls would be efficiently routed to the most appropriate person. With the current system, callers to the contact center were experiencing problems such as long wait times and often had to be transferred one or more times to get to the individual that could best address their need.

The credit union was also looking to the future and wanted to implement a system that would eventually support voice-over-IP (VoIP) and on-campus wireless communication.

After thoroughly evaluating systems from leading vendors, ECCU selected the Siemens HiPath 4000, an IP convergence platform built over a distributed architecture. ECCU also deployed Siemens HiPath Xpressions, a unified messaging application that combines voice, fax, and e-mail messages on a Windows server; and Siemens HiPath ProCenter Advanced, a portfolio of solutions for the contact center that includes capabilities such as skills-based routing, detailed reporting, and the integration of voice, e-mail, fax, IP communication and Web contacts.

The products are part of Siemens' LifeWorks vision of unified communication and collaboration—a strategic effort the company calls “open communications.” The provision of open communications solutions is based around several key technology and business attributes: employees can communicate and collaborate regardless of device, network or IT environment; organizations have flexibility in moving toward an open communications environment; and solutions are capable of deep levels of integration into business processes. At ECCU, HiPath ProCenter's ability to provide agents and managers customized team lists and views of available team members across the enterprise helps foster more timely collaboration and member support.

ECCU selected the Siemens solutions because they offered the best price-performance, as well as the contact center functionality the organization needed, Weisenberger says. The credit union also wanted a system that supports both VoIP and TDM. “We weren't ready to jump to an all VoIP world, but the HiPath solution allows us to move that direction over time,” Weisenberger says. All new phones being installed at the organization are IP phones.

A smooth transition

The communications upgrade was completed over a three-month period. Siemens handled project management, and the Siemens personnel on site helped ensure a smooth transition to the new systems.

“We were glad to have people like the Siemens installation engineer available, because we went from a completely different system to this one,” says Keith Hollar, a member of the ECCU technical staff who manages the relationship with Siemens. “They were able to work through issues much easier than we could have done on our own,” because the Siemens staff was more familiar with how the systems work, Hollar says. Weisenberger agrees. “With [the previous system] we were highly self sufficient; we knew the system inside and out,” he says. “The Siemens system was new and unfamiliar to us. We depended on Siemens, and their responsiveness was always good.”

The new Siemens system has provided ECCU with expansion capacity while delivering reliable communications to ECCU's 280 employees. Additionally, HiPath ProCenter is delivering significant benefits to the 40 contact center agents. With its new IP network, ECCU was able to integrate the phone system at its branch office in Colorado Springs, Colo. into the communications network used by the main office. Previously the branch office had a separate PBX that was less seamless and more difficult and costly to support.

The skills-based routing capability forwards member calls to the contact center to the most qualified agents—regardless of the medium used. The rate of call transfers has decreased by 50% since the implementation, because

callers are directed to the right person in the first place. The average time it takes to answer a caller's query has also decreased. Improved efficiency in the contact center has resulted in annual savings of more than \$100,000.

HiPath ProCenter has enabled ECCU to make a "quantum leap" in how it manages email queries from members, says Tom Mauer, manager of the contact center. "A significant number of our members are living or working overseas, and email has become an important lifeline for them," Mauer says. Routine email such as address changes and check orders are automatically routed to staff who can respond with simple templates. Time critical functions that include keywords such as "new loan", "refinance", "payment", or "transfer" are separated out for more immediate processing.

The reporting capabilities of HiPath ProCenter give management a better understanding of the productivity of agents in the contact center, and more insight into why members are calling or emailing the center according to Mauer

Since the initial implementation, ECCU has upgraded several of the network components, moving to newer versions of HiPath Xpressions and HiPath ProCenter.

Going wireless

In April 2007, ECCU chose Siemens to integrate wireless voice and data communications into their existing network. The goal was to provide the organization's staff with secure wireless communication in two buildings on ECCU's 17-acre campus. They also needed to provide guests on campus the ability to access the internet wirelessly without access to the secure network.

For the mobile wireless deployment, ECCU needed a cost-effective solution that would meet its current and foreseeable future needs, and that was

fully compatible with its existing voice and data infrastructure. Management wanted an efficient way for staff members to access the network via laptops and other devices, regardless of where they were working on the ECCU campus, with security according to Weisenberger. "The wireless voice capability is especially useful for ECCU's IT and facilities support staff that move around the campus a lot", he says.

With wireless communications, ECCU can leverage Siemens open communications principal of fixed mobile convenience (FMC). Siemens' enterprise FMC offering is an open, end-to-end solution that unifies enterprise communications by bringing together disparate communications networks to create a seamless enterprise-wide foundation for mobility.

The wireless VoIP communications solution includes Siemens optiPoint WL2 Professional wireless VoIP phones, which deliver the same user experience as Siemens desktop devices. The wireless solution was designed around ECCU's existing LAN voice and data services, making for a seamless deployment.

The credit union is operating two separate wireless networks, one for guests and another for staff members who can gain secure access to certain information based on their role in the organization. With its latest implementation, ECCU is able to provide both wired and wireless communication that's effective and reliable.

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