

## Financial Institution Banks Savings With Mitel Networks IP-based Enterprise Solution

### CUSTOMER'S NEEDS

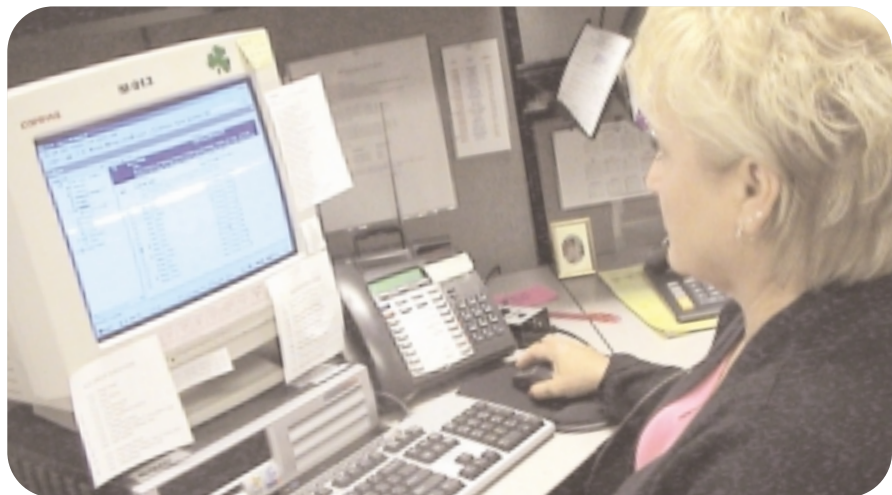
- Leading-edge contact center solution
- Branch office solutions to connect all locations with one phone system
- Teleworker solution for remote contact center agents
- Features including quality assurance monitoring, silent coaching, attendant, skills-based call routing
- Improved efficiencies and customer service

### SOLUTION COMPONENTS

- Mitel Networks 3300 Integrated Communications Platform
- Mitel Networks 3340 Global Branch Office Solution\* (connecting 5 branch offices)
- Mitel Networks 6150 Multimedia Contact Center
- Mitel Networks OPS Manager
- Mitel Networks 6010 Teleworker Solution
- Wireless IP Phones

### RESULTS

- Anticipated savings of \$60,000 per year
- Eliminated cost of separate analog lines for numerous fax machines
- Improved customer service and satisfaction
- Seamlessly linked branch offices and remote workers with four-digit dialing
- Greater efficiency through automated call distribution, unified messaging and skills-based call routing
- Improved planning through enhanced call reporting
- Loss prevention through caller ID
- Improved security with call recording for voice authorizations



Listening to Kevin Joint of Teacher Federal Credit Union (TFCU) talk about his responsibilities as Phone Center Manager, you get the sense that the electronic age has definitely changed the face of financial institutions. TFCU counts e-branches, e-loans, e-mail contact, its web site and ATM-only branches among the many service offerings for which Joint's contact-center staff provides customer support. But e-service doesn't mean the credit union provides any less personal service to its members.

"Member satisfaction is our sole gauge of success," Joint says. "We want to know if there are recurring complaints, if our hours are flexible enough, if callers are getting help the first time."

To improve its service offerings, communication and efficiencies, TFCU recently selected a Mitel Networks™ phone system, branch office solution and contact center from local reseller Ardent Partners.

### Transition to New Way of Business

After evaluating its needs, TFCU enlisted a consultant to assess six potential vendors. Joint recalls, "In terms of functionality and bang for the buck, Mitel Networks was the highest ranked vendor of the four we considered. Mitel Networks has the superior contact center offering."

In just one weekend, Ardent Partners switched TFCU's its 13-year-old phone system over to the new Mitel Networks solution – including a multimedia contact center and five branch offices.

"We've gone from answering calls live to having an auto-attendant that segments calls and automatically distributes them to the right agent," says Joint as he lists how the new solution has changed TFCU's operations. "Enhanced reporting has given me a lot to think about in terms of planning for



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# Customer Experience

## ➔ Teacher Federal Credit Union

### ABOUT TEACHER FEDERAL CREDIT UNION

- **Business type:** Credit union
- **Members served:** Teachers, their family members and other select employee groups
- **Number of employees:** 136
- **Number of members:** approximately 47,000
- **Number of incoming calls per day:** 700-800
- **Locations:** Headquarters and one branch in Golden Valley; other offices and branches in Apple Valley, Roseville, Maple Grove, Renville and St. Cloud

*"In terms of functionality and bang for the buck, Mitel Networks was the highest ranked vendor of the four that we considered. Mitel Networks has the superior contact center offering."* Kevin Joint, Phone Center

Manager, Teacher Federal Credit Union

the future and improving efficiency. We've improved communications with our outlying offices with four-digit dialing between locations. And with Unified Messaging, I can call into my voice mail when I'm on the road and listen to my e-mails."

Even small improvements can have big business impact. "Caller ID has helped in the loss-prevention area," he begins. "It lets us ensure we have every member's most recent phone number. And we now have a call recording function that our finance department uses to capture voice authorizations for wire transfers in .wav files."

And, using Mitel Networks wireless capabilities "our main branch coordinator is always accessible to the tellers and financial service reps whether she's at the counter or back at the vault."

### Designed for Change

The Mitel Networks solution also helps TFCU manage near-term growth and change. "We're tight on office space here," Joint says, "so three of our contact center agents use the Teleworker Solution from home." With this solution, remote agents appear to callers as if they're in the office, and agents get all the same features as their office colleagues. And, when TFCU moves into a larger administration facility, the Mitel Networks system will streamline the transition: "We'll literally just unplug

everything, wheel the rack over to the new location and plug it all back in. No reprogramming."

Simplicity like that is apparent throughout the solution. Joint says, "I can manage everything from my desktop – even branch offices. OPS Manager walks me through the process of setting up new employees. And if employees move, they literally unplug their phone at one desk and plug it in at another."

So what's Joint doing with his new found time? It seems there is no shortage of things to keep him busy: "We'll soon start segmenting out loan and mortgage calls so customers don't have to wait just to be transferred. With skills-based routing, I can restructure the call center based on skill so new hires can be trained on basics before being thrown into complicated transactions. And, we'll fully integrate our telephone banking system so that callers just press a button to get in or out, rather than calling separate numbers."

With these improved efficiencies and call handling – coupled with cost savings associated with IP– TFCU figures, "we'll be saving about \$60,000 a year with the Mitel Networks solution."

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