

A call center goes remote in just two weeks

Premier America Credit Union enhances the member experience and keeps employees safe during a pandemic with the help of a cloud-based communications platform

Within the last decade, traditional ways of banking have changed as new customer lifestyles and technologies have created new digital expectations from both clients and employees.

63-year-old Premier America Credit Union (PACU), whose mission is to make banking easier for their members and “serve their tomorrow needs today,” has embraced these changes with the guidance of a roadmap from Rudy Pereira, PACU president and CEO, and senior vice president and CTO Janaki Rao. To accomplish their mutual vision, PACU partnered with Spectrum Enterprise to ensure they can support new digital expectations by implementing new connectivity solutions and a hosted call center.

The partnership began with PACU’s legacy MPLS network, which had started to impact the company’s ability to quickly process transactions and deploy new digital services. Rao decided that to support future growth, PACU needed to overhaul its IT infrastructure.

It was a tall order for one of the largest credit unions in the country, with \$3 billion in assets and a rapidly growing number of locations. Several of PACU’s 20+ branches, located in Southern California and Texas, were

experiencing intermittent network bandwidth challenges. “Branches with more than five employees had a slow 3 Mbps network that couldn’t easily scale,” says Rao. “An infrastructure upgrade was needed so we could digitally evolve and support our growing base of over 114,000 members.”

After meeting with several technology providers, Rao partnered with Spectrum Enterprise for a scalable connectivity solution that included Fiber Internet Access service and a dedicated, multipoint 100 Mbps fiber Ethernet network. He chose the company primarily because of their extensive service area and the security provided by the private Ethernet connection.

The benefits of the new infrastructure were immediate and significant. The credit union’s branches now support new, high-bandwidth applications and high-speed transaction processing. And there was another, unexpected benefit: The solutions slashed PACU’s monthly network spending. “We’re getting significantly more bandwidth for a much lower cost,” says Rao.

In addition to updating PACU’s network, the project formed a strong partnership between Rao and his Spectrum Enterprise account



PACU senior vice president and CTO Janaki Rao partnered with Spectrum Enterprise for a hosted call center to ensure member and employee safety during the pandemic.

Client profile



Company

Premier America Credit Union

Industry

Financial

Services

Hosted Call Center
Ethernet
Fiber Internet Access

Overview

- During the onset of the pandemic, Premier Access Credit Union (PACU) set out to safeguard the health of its employees by enabling them to work from home.
- To support remote operations for its call center, PACU urgently needed to deploy a new phone system.
- The credit union turned to Spectrum Enterprise to deploy a Hosted Call Center solution within just two weeks.

Outcomes

- Call center employees are able to service members safely from their homes.
- Agents service more members more quickly due to the solution's advanced functionality, simplicity and real-time call analytics.
- PACU is able to repurpose branch location employees as call center agents when needed.

Why it matters

- PACU can continue supporting new customer and employee digital initiatives — even in the face of unexpected business challenges.
- The credit union is able to keep all team members safe and employed.
- PACU has a trusted technology partner who is ready to help them tackle whatever project comes their way next.

“We’re very fortunate. It’s been a very good partnership.”

– Janaki Rao, Chief Technology Officer and Senior Vice President



Remote call center employees take calls from their laptops using a soft client application.

manager, Sam O’Grady. Little did Rao know that the great relationship he had developed with O’Grady would pay substantially larger dividends in the very near future.

An unexpected situation demands urgent action

On Thursday, March 12, 2020, COVID cases began to rise across the country, and the PACU management team found themselves navigating how to conduct business in the midst of a global pandemic. They held an emergency strategy meeting and outlined their goals, which were to safeguard the health of members and employees, continue to provide an exceptional member experience, and keep all their staff employed.

To achieve these goals, their call center employees would have to take member calls remotely. However, PACU’s on-premises phone system wasn’t capable of supporting a remote call center. They needed a new solution — fast.

Rao immediately thought of the cloud-based Spectrum Enterprise

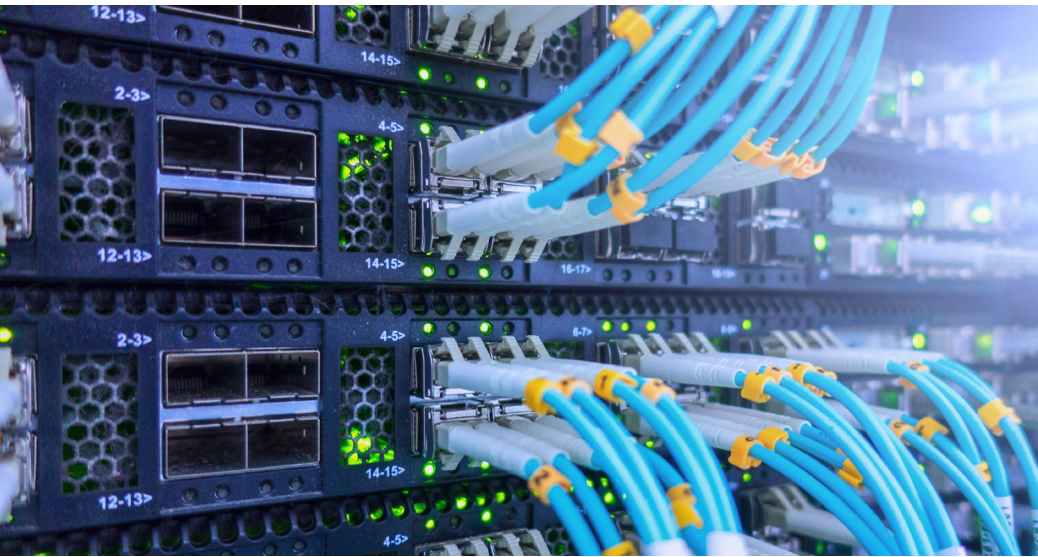
“We see Spectrum Enterprise as an extension of our in-house IT team.”

– Janaki Rao

Hosted Call Center solution, which combines traditional call center capabilities with unified communications (UC) tools.

He’d discussed it with O’Grady several times, and hadn’t been ready to make the move. But with call center employees who had to work safely at home, Rao knew he needed this solution, which has a soft client application that would enable member calls to be routed to the laptops of remote call center employees.

Plus, the fully managed solution would include Unity, an application with numerous features such as click-to-dial and real-time analytics, which would help employees — even if they were remote — better manage their call queues.



Remote call center employees access Hosted Call Center capabilities using their home internet connections, which connect to the PACU VPN.

While other technology companies could provide a service similar to Hosted Call Center, Rao knew from firsthand experience that he could trust in both the reliability of his Spectrum Enterprise account team and their solutions. Plus, having just one partner deliver most of PACU's digital infrastructure would simplify solution management.

That afternoon, Rao called O'Grady and told him he needed the Hosted Call Center solution. He wanted everything done within just two weeks: a proof of concept (POC), implementation, testing and training. O'Grady told his partner and friend that he would roll up his sleeves and get to work on a plan immediately.

A dedicated team rises to the challenge

Back at Spectrum Enterprise, O'Grady called a meeting with colleagues from every department involved in a Hosted Call Center rollout: project management, product management, operations, engineering and sales support. Because PACU already had the fiber connectivity required to support the solution, they could eliminate some of the steps typically required for deployment.

Together, the group developed a two-week project timeline involving a phased approach. Hosted Call Center would be rolled out to employees in the main call center in waves to ensure all agents received the assistance they needed to become comfortable using the new solution. It would be tight, but the team was fully committed to making it happen on time to support not only PACU, but also the communities the credit union serves.

“Our partnership with Spectrum Enterprise is not just for today. It's for the future.”

- Janaki Rao

O'Grady called Rao with the good news and got to work. In just two days, they executed a POC demonstrating how member calls would be routed to PACU employee laptops. Routing the calls to the laptops would eliminate the need to provide employees with new equipment. The POC was a success, and the project moved forward.

PACU quickly created a VPN that would enable employees to tunnel into the PACU network and access the solution's capabilities using their home internet connections. Then, just four days after the project kickoff, the Spectrum Enterprise and PACU teams worked to modify existing call flows so calls coming into the call center would be redirected to the laptop of the appropriate employee.

Over the next week, the teams tested the soft client feature and started training employees. During this time, the Hosted Call Center solution was confirmed to have met security compliance standards by Rao, who is a Certified Information Security Auditor (CISA), Certified Information Security Manager (CISM), Certified Information Systems Security Professional (CISSP), and a Microsoft Azure and AWS-certified solutions architect.

With a lot of skillful planning, late nights and two solid weekends of work, Spectrum Enterprise and the PACU IT team met the two-week implementation deadline. After an additional week of testing, the solution was rolled out in a soft launch to 45 call center representatives and five supervisors, who took live member calls with Spectrum Enterprise technical support staff standing by to provide assistance as needed. Over a period of several weeks, the solution was gradually rolled out to other call center employees.

PACU sees immediate results

The benefits of the Hosted Call Center solution were apparent immediately. Besides allowing employees to service members seamlessly and safely from their homes, it increased their productivity — and helped provide a better member experience.

Call center agents and supervisors have been able to optimize call

CASE STUDY A CALL CENTER GOES REMOTE IN JUST TWO WEEKS

management using Unity, which provides real-time analytics including how long a call is taking, the number of people in a call queue and how long they've been holding. That, combined with the ability to rapidly assign more agents to call queues when needed, has enabled agents to take more calls in less time, so members are served more quickly. "Hosted Call Center allows us to continue improving member service during this pandemic," says Rao.

Because the Hosted Call Center interface is very simple and intuitive, phone system-related IT support calls decreased from 10 calls per day to close to zero shortly after deployment. "Agents can either answer a call, put it in a queue or reject it," says Rao. "Because there are limited options, there is no confusion. The solution is so simple that our existing IT staff can easily manage it."

And one of the best things about the new solution? It's allowed PACU to repurpose branch location employees as remote-based call center agents as needed to help manage the increased call volume they've been experiencing during the pandemic.

"From a member perspective, Hosted Call Center is providing more value because we can reach out to more members easily with our remote calling capabilities during the pandemic," says Rao. "From an employee perspective, not only are they able to work in a safe environment — they're also able to take advantage of new tools that improve their efficiency."

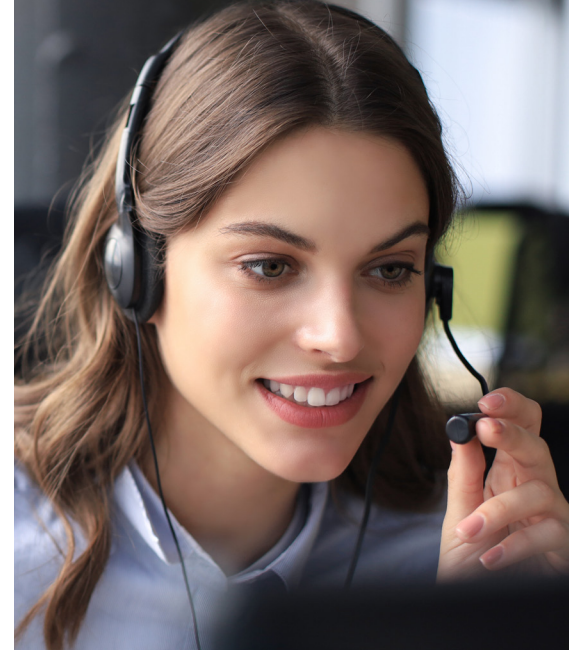
Word of how well the Hosted Call Center solution worked for the main call center spread fast. Soon, other departments with call centers including lending, insurance and collections requested that their teams also be able to use it. To date, Rao's team has rolled it out to more than 130 team members across the organization.

A credit union ready for tomorrow

Even though this project was a big success, Rao knows that there will always be new and unexpected challenges around the corner. Premier America Credit Union is always working to improve the digital experience of its employees and members.

For example, Rao plans to use Hosted Call Center's CRM integration module with Salesforce, which will automatically present call center agents with member information during calls. Long-term, Rao is working with Spectrum Enterprise on omnichannel marketing solutions to enable a number of digital enhancements, including conversational AI and click-to-dial, which will help meet customers' expectations to communicate with the credit union however they prefer.

No matter what new technology projects they tackle — planned or unexpected — PACU is prepared because they're not alone. They have a trusted technology partner — one who can step up to big challenges, even in the face of a global crisis, and exceed expectations. "We're very fortunate. It's been an exceptionally good partnership," says Rao.



Hosted Call Center enabled PACU to avoid furloughs by repurposing branch location employees as remote-based call center agents.

About Spectrum Enterprise

Spectrum Enterprise, a part of Charter Communications, Inc., is a national provider of scalable, fiber technology solutions serving America's largest businesses and communications service providers. The broad Spectrum Enterprise portfolio includes networking and managed services solutions: Internet access, Ethernet access and networks, Voice and TV solutions. Spectrum Enterprise's industry-leading team of experts works closely with clients to achieve greater business success by providing solutions designed to meet their evolving needs. More information about Spectrum Enterprise can be found at enterprise.spectrum.com.

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