



Helping members enjoy prompt, personalized and consistent treatment with “one-stop-shopping” across all channels: **Member Relationship Plus**

Every time a member contacts your credit union, there are two likely outcomes. You provide great service and enhance member loyalty...or their request gets lost and you drop the ball. When a member calls, visits, writes or e-mails, how do you communicate that request to the staff members who need to take action? A phone call? A voice message? An e-mail? A sticky note on a monitor? How do you know the request is taken care of?

Don't let an opportunity fall through the cracks.

What if there were a way to log every member contact as it came in? To make sure it was routed exactly to the right staff person with all the relevant information included? And to see at a glance what the status is or that it was completed properly? And what if you could proactively find ways to meet other needs for the member?

Track every customer communication.

Member Relationship Plus is a complete call center and communication tracking system that captures and stores every member communication. Each member contact is assigned a job ticket, and each ticket is tracked as it works through the credit union. Notes are added as information is collected. Responses to typical questions and situations can be scripted for member service representatives. Cross-sale opportunities can be included via optional modules. In advance of picking up a call, representatives can even be advised of the member's name and what his or her last call was concerning.

Member Relationship Plus helps you nurture member relationships in powerful ways:

- Get personal with your members—Intelligent tools let your staff quickly resolve problems, answer questions and assign member inquiries to the right staff member.
- Gain new business—Proactively contact new prospects, increase satisfaction and optionally offer cross-sell opportunities.
- Streamline workflow—Each member or prospect inquiry received via a visit, call, e-mail or chat session receives an electronic ticket, which can be completed by the receiving employee or assigned to other staff, department or third party for completion.
- Ensure service quality—Review employee work queues and results, and monitor how well commitment dates are being met. Easily monitor day-to-day tasks and



workflow to track progress, measure performance and ensure timely follow-up. Create scripts for typical requests to ensure consistent messaging.

- Share knowledge—Centralize information and share knowledge—from member profiles, cross-sell scripts, FAQs and more—between internal staff, off-site employees and call center personnel.
- Maintain safety & security—All information is securely backed up at a redundant off-site data center.

Member Relationship Plus also provides the following additional benefits:

- CEO—Gain new business by proactively contacting and tracking new prospects, increase satisfaction by improving service to existing members, and boost employee productivity.
- CFO—Increase revenue using reminders and scripts to cross sell products and services.
- CIO—Centralize information and share knowledge throughout the organization, and keep it safe with secure transactions and disaster recovery protection.
- COO—Streamline workflow among internal staff, off-site employees and third party call center personnel.
- Human Resources—Manage workloads and track performance by reviewing employee work queues and results, and monitoring how well they are meeting commitment dates.
- Member—Receive quick, accurate and consistent service from all credit union representatives, and satisfy multiple financial goals with one-stop shopping!