



## Our Customers Speak for Our Solutions

### *An OAISYS Case Study*



First Community Federal Credit Union, based near Kalamazoo, Mich., is a multi-branch credit union that has nearly doubled its asset base in the last year. Its growth and acquisition of different, formerly independent facilities required a unified training approach for all of its telephone-based employees.

Previously using a record-on-demand solution, it quickly became apparent that approach would no longer fit their needs. First Community turned to OAISYS Authorized Reseller First Telecommunications for recommendations.

After reviewing the available options, First Telecommunications' Kevin McGrath recommended an OAISYS Tracer solution, based on the considerations of available features, price point and customer service.

"Some of the competing offers had a much higher priced entry point," McGrath said, "but much more importantly, First Community had a great experience with OAISYS' Sales Engineering and the webinar they provided. We also have a high degree of comfort with OAISYS products, which we've used for years at First Telecommunications.

"The customer had a general, visceral feeling about what investments would be acceptable, and we were able to validate through live demonstration that all the critical functionality they wanted to incorporate into their business could be achieved within that budget."

"We are growing," said First Community's Member Solution Supervisor Jason DeMorrow, "Our needs for communication are growing as well; so we are constantly looking at doing different things, particularly more specific call center (enhancements)."

The credit union is currently running an informal call center, with the goal of centralizing its customer service center in the future after standardizing its operating and communication systems.

Tracer has proven to be an invaluable solution in terms of quality assurance and staff training for First Community. "We have all of the calls coming into our credit union recorded so we can go back and then score anybody in various departments, whether they're our collectors, our front line service staff or our lenders who are taking applications over the phone," DeMorrow said. "We use it regularly for training new hires who are new to financial institutions to give them an idea of the types of calls we get from members.

"We specifically save calls that we know are good training opportunities to coach in how to best consult with members."

Like many other organizations, First Community has begun tying call recording evaluations into employee performance reviews to incentivize and maintain consistent customer service for phone-based staff. "I've developed a quality monitoring score sheet," DeMorrow



said, "and it is a requirement on employees' annual reviews that they score at a certain level to be considered as meeting expectations."

Another benefit First Community has realized since using Tracer is an improved ability to resolve disputes. "Resolving member issues is easier; so we're doing better business. I'm able to go back and listen to things members were told in terms of the quality of service they're given."

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This has included the ability to avoid loss and maintain First Community's reputation and credibility. DeMorrow cited a particular case where Tracer proved especially helpful in this regard.

"We were able to go back and listen to a call and determine we had verified member identity in a call. The member was concerned that we had transferred money to an account that we should not have, but after listening to the call, we were able to determine that it was the member who had called and asked for that transfer to be done. It could have been a 'he said/she said' type of thing, except we had the ability to verify that."

As the credit union's member solutions supervisor, DeMorrow has incorporated Tracer recordings into the performance of his own regular customer service duties.

"When I see emails or notes that come across my desk saying, 'This customer would appreciate a call back,' I can always go back and listen to the initial conversation to find out exactly what they were concerned about and how it was handled. Then I can have a head start on how I'm going to resolve the issue before I even make contact with the member again."

DeMorrow lists several Tracer selling points that led First Community to select the solution. These include:

- Cradle to grave recording, which captures calls in their entirety regardless of when the recording is started, as opposed to their previous record-on-demand solution
- Advanced, flexible search capabilities
- The ability to securely share calls with other users

"Sharing calls is big," DeMorrow said. "We have branch managers at multiple locations, so we're constantly sharing calls with each other."



"We're very happy with what we have and what we're using," DeMorrow said. "If anyone were to ask me for a recommendation on the product I would give a ringing endorsement. What we were using before was antiquated and difficult to use. Really it's piece of mind because I know I can go back and listen to any call that has come into the credit union or that we've made from it. It's a very useful tool."



To find out more about OAISYS, Tracer and Talkument, please visit our website at [www.oaisys.com](http://www.oaisys.com).

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