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Member Appointments and Branch Kiosks Take Service to Another Level at American Heritage Credit Union

“Everybody is pleased that we have a state-of-the-art visitor management system in place that replaces our old paper-based clipboard visitor check-in system. We have been very happy with Better Branches because we feel that they are on the same page as we are and are committed to delivering innovative software that helps us better serve our members.”

Breana Galanaugh, Branch Operations Project Manager at American Heritage Federal Credit Union

Credit Union:

American Heritage Credit Union

Solution:

Better Lobby



Benefits:

- ❖ Appointments flow seamlessly into employees' Outlook calendar
- ❖ Software helps tellers in their cross-selling efforts
- ❖ System developed exclusively for credit unions

American Heritage Credit Union (AMHFCU) is a \$2 billion credit union serving over 800 workplace partners. AMHFCU is the 121st largest Credit Union in the Country with over 165,000 members and 35 branches serving Philadelphia, Bucks, Montgomery, Delaware, PA and Camden, NJ counties. AMHFCU's stated mission is "to improve the financial lives of our members." One of the ways that AMHFCU is accomplishing this goal is by offering their members the convenience of on-line appointment booking. Their partner in offering this leading-edge technology is Better Branches Technology, the recognized credit union industry leader in appointment handling and branch visitor queuing and management.

Breana Galanaugh, Branch Operations Project Manager at American Heritage Federal Credit Union (AMHFCU), was assigned to implement Better Lobby into three of AHFCU's branches in 2017. With over twelve years of credit union and project management experience, Breana was well up for the task. She notes that "we experienced such great success rolling out Better Lobby that we fast tracked the implementation to eight branches in 2017 instead of three. Plus we plan on having seventeen branches live in 2018." Since Better Lobby is a browser-based application, employees learn it quickly with a minimal amount of training. According to Breana, "our staff loves working with Better Lobby because it is very user friendly and has great navigation through all of its screens." She adds that "everybody is pleased that we have state-of-the-art visitor management system in place that replaces our old paper-based clipboard visitor check-in system."

Members also appreciate the ability to book appointments with AMHFCU staff on their mobile phones, tablets or PCs. Better Branches' appointment booking software is built using responsive design which allows it to automatically adjust to the screen size of the device being used to ensure readability. Appointments scheduled using the Booking Tool are recorded in Better Lobby Appointment Calendar and are visible to all Better Lobby staff users. Employees love the fact that data flow seamlessly into their Outlook Calendar. Breana



points out that “we want to be known for taking appointments because we feel that this a differentiator for us and really helps us deliver extraordinary service to our members.” She also shares that “our members have been very pleased with the appointment setting capabilities that we have added. They especially like that we remind them of the necessary paperwork to bring to the appointment so that we can ensure that the meeting will go smoothly and be completed with just one visit.”

When visitors arrive at one AHFCU’s Better Lobby Kiosk-equipped branches, they are met by a First Impressions Desk staff member who checks them on an iPad. Tellers are also using Better Lobby so they can easily see at a glance what other staff members at the branch are doing. If they are all busy at that moment and the member is in a hurry, the teller can quickly book an appointment for the member to return at a time that is most convenient for the member. Breana describes this as “the best of both worlds.” She explains: “if the teller can cross sell a member on a new product or service, they can see the queue and add them to it immediately to see someone right at that moment with no waiting. If the queue is busy and all branch employees are currently with members, the teller can see the appointment schedule for all branch employees and book an appointment at a later date for the member.”

In terms of technical support, Breana states that “we have had nothing but positive experiences with Better Branches. They are very knowledgeable and always there to help us out.” In addition to rolling out more branches, AMHFCU is planning to add video conferencing in the future and is looking to Better Branches for their assistance via their Video Meeting Queue Module. This software extends the Better Lobby Branch Queue beyond the branch so that the queue can be seen and served by expert staff located elsewhere. Breana concludes that “we have been very happy with Better Branches because we feel that they are on the same page as we are and are committed to delivering innovative software that helps us better serve our members.”

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