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Large Minnesota Credit Union enjoys great success and productivity gains with Better Branches' state-of-the-art lobby management and appointment booking system

"Working with Better Branches has been a great experience. Their support is simply amazing and their collection of best practices has been invaluable in making this project a complete success for us. I highly recommend them to any credit union."

Alisha Johnson, Senior Vice President of Marketing, Sales and Service at Ideal Credit Union

Formed in 1926 as a small postal credit union, Ideal now serves over 48,000 members in six central Minnesota counties. What sets Ideal CU apart is their stalwart commitment to providing personalized service above and beyond their members' expectations. Delivering stellar service at their five branches is a very high priority for the \$605M asset credit union which is why they choose to implement the credit union movement's top lobby management system: Better Lobby from Better Branches.

Alisha Johnson, Senior Vice President of Marketing, Sales and Service at Ideal Credit Union, was tasked with helping to implement a lobby management and appointment booking system. With over five year's experience at the credit union and twenty two years of banking experience, she was well qualified for the assignment. She recalls that "our CEO, who is very innovative and always looking for ways to improve our member service levels, attended a seminar on appointment booking for financial institutions and was immediately intrigued by the benefits of implementing such a system." Thus began a due diligence research journey that led to three finalists. Johnson notes that "we considered building a system in-house initially, but we quickly realized that our requirements were far too complex. We developed quite a list of features and functionalities that we needed to fulfill our goals." With over a dozen years of experience developing robust lobby and appointment solutions for credit unions nationwide, Better Branches emerged as their clear choice.

According to Johnson, "Better Lobby was very well received by both our members and staff because it is so easy to use – all demographics found it very intuitive." She adds that "it was the smoothest and cleanest implementation that I have ever had the pleasure of being involved in because literally every phase happened as planned and on time." Better Lobby, which includes eight modules, is designed to help credit unions manage their workforces to improve both service levels and sales results. Ideal CU is using the

Credit Union:

Ideal Credit Union

Solution:

Better Lobby



Benefits:

- ❖ Intuitive interface with virtually no learning curve
- ❖ Boosted tellers' cross-selling efforts & streamlined member conversations
- ❖ Contact center agents can book appointments for branch staff



New Account Management, Self Check-in KIOSK, Branch Appointments Calendar, and Mobile Appointment Booking Tool modules with great success. Johnson explains that “the system is a tremendous help in staffing and modeling branch employee schedules. It also provides great metrics, in-depth reporting, and valuable analytics right out of the box.”

Both the tellers and platform staff have noticed efficiency gains by using the software. For example, tellers can refer a member to a loan officer and check them in with a set appointment time as they are handling the member’s transaction, while platform staff can be completely prepared to talk to the member at the arranged appointment time. “The system has really helped with our tellers’ cross-selling efforts and streamlined conversations for our members when they sit down with our platform staff,” says Johnson. Ideal CU can now granularly track each and every member visit, plus senior managers know exactly how long it takes for branch employees to accomplish specific tasks. Even the call center is closely involved in setting appointments via the powerful Mobile Appointment Booking Tool. Agents can check the schedules of branch employees across their branch network and quickly book appointments with a few mouse clicks. Members are then automatically reminded of their stated appointment time and prompted by e-mails or text messages to bring the information necessary to the meeting.

Johnson describes the process of working with Better Branches as “a great experience that has been beneficial to everyone involved. Their support is simply amazing and their collection of best practices has been invaluable in making this project a complete success for us.” In the next phase of their project, the credit union plans to extend their appointment booking capabilities directly to their members on their website and via mobile devices. Johnson and her team are looking forward to all of the benefits that will be gained by this implementation, and she concludes that “working with Better Branches has been a great experience and I highly recommend them to any credit union.” *t-t*

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