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SchoolsFirst Federal Credit Union Boosts Member Service and Optimizes Staffing Levels with Better Lobby

"After extensive due diligence, Better Branches Technology's Better Lobby emerged as the best solution for our credit union."

Sean Plunkett, Business Analyst for Branches at SchoolsFirst Federal Credit Union

SchoolsFirst Federal Credit Union, headquartered in Santa Ana, California serving the educational community in Southern California, has over \$10 billion in assets. With over 600,000 members to serve in the ten most southern counties of California, SchoolsFirst FCU has developed a branch network of forty three branches. In order to provide the best possible service to this large membership base, SchoolsFirst FCU has partnered with Better Branches Technology, the credit union movement's leading provider of branch visitor queuing and workforce management software.

For several years the credit union had a number-based visitor queuing system in place at nine of the largest branches. While the system successfully queued visitors for service, staff did not find it user friendly and senior managers found it cumbersome and less than optimal for managing branch team-members. Knowing that queue management and good service are directly connected, the SchoolsFirst FCU Operations team went on a quest for a replacement system.

Sean Plunkett, who has been with the credit union for over ten years and currently serves as a Business Analyst for Branches, recalls that "we went through a very thorough search process that included working with teammembers from various branches, reviewing vendor demonstrations, and developing a detailed RFP (Request for Proposal)." After this comprehensive search for a user friendly solution, Better Branches Technology's Better Lobby emerged as the best solution for the credit union.

Better Lobby was built from the ground up to help improve branch sales results, service levels, and branch ROI, and includes five modules: New Account Management; Self Check-in KIOSK; Teller Management; Mobile Wait-time Indicator; Staff Scheduler; and Branch Appointment Calendar.

Credit Union:

SchoolsFirst Federal Credit Union



Solution:

Better Lobby

Benefits:

- ❖ Smooth implementation and no production downtime
- ❖ Staff finds the system easy to use and very intuitive
- ❖ Improves both the speed and quality of branch service



Taking a measured approach, SchoolsFirst FCU initially rolled out the platform to nine of their busiest branches, retiring the previous system. According to Plunkett, “the implementation was seamless. Our IT Department was pleased because it is a very reliable system, and our branch team-members love how easy it is to use.”

With over ten years of software development experience, Better Branches Technology takes great pride in the quality and reliability of their software. During the life of the Better Branches solution, Better Branches Technology has collaborated with credit union executives to enhance the usability of all of their modules. Plunkett confirms that “the system is very intuitive and does not require intensive training, plus our downtime has been virtually nonexistent.”

In action, Better Lobby/New Accounts significantly improves both the speed and quality of branch service. Branch managers now have the ability to see who is waiting in their lobby and who is available to serve them. He adds that “this software is well suited to our goal of delivering a superior Member service experience.” The integrated nature of the platform enables an elegant referral or service “hand-off” from Teller to Platform staff. Additionally, the credit union uses the system to fine-tune and optimize their branch staffing levels which helps control and reduce labor costs.

Following the success of Better Lobby in the first nine branches, SchoolsFirst FCU decided to expand the system by twenty-two additional branches. Plunkett explains that “the time was right to expand because we had other branch managers asking when they would be able to use Better Lobby in their branch.”

At the time of writing, the expansion is well underway and proceeding smoothly. ^{t-t}

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