

Snapshot

Name : **Vancity Credit Union**

Industry: Finance

Location: BC, Canada

Website: www.vancity.com

Customer since: 2004

Challenges

- ✓ High volume of internal emails
- ✓ Inconsistent service responses
- ✓ No reporting on requests type
- ✓ No reporting on staff activity

Results

- ✓ next business day Service Level achieved
- ✓ Auto-assign to right staff
- ✓ 100 % employee satisfaction

Background

Vancouver City Savings Credit Union (Vancity) is a member-owned co-operative financial institution based in Vancouver, British Columbia. Vancity is Canada's largest credit union and a Living Wage employer with \$15 billion in assets, more than 417,000 members and 59 branches throughout Metro Vancouver, the Fraser Valley, Victoria and Squamish. More information about Vancity is available at www.vancity.com.

Founded in 1946, Vancity provides a variety of financial services including banking, borrowing, investments, and insurance. Vancity is a member of the Global Alliance for Banking on Values, a network of the world's leading sustainable banks sharing the commitment to achieving triple bottom-line impact through responsible banking practices.

Challenges

The main challenge in Vancity's HR Department was for Payroll & Benefits. They had become a call centre of sorts, because employees did not know who to contact for their queries.

Payroll & Benefits would receive up to 400 emails per week to their central shared inbox. It had become confusing, difficult to monitor and extremely time consuming. The Payroll & Benefits staff would take turns servicing the inbox however, it was a daunting and unenjoyable task.

Solutions

By implementing CustomAnswers "HR Service Request tool" Vancity was able to create workflows for the Payroll & Benefits Department. Employees submitting their HR Service Requests would receive auto responses assuring them that their question had been received, provided the Payroll & Benefits staff member's name and when they would receive a response.

Results

The desired outcome was achieved immediately. Within days the employees adopted to the HR Service Request tool. They received much better service, the number of requests reduced immediately and the service level was adhered to because they had created workflows and knew who was accountable.

Due to the success of this implementation, Vancity rolled out the tool to the remaining HR teams over the next few months with the same excellent results. Vancity Employees now know that in order to receive a timely response to the query they need to create an HR Service Request which will be actioned quickly and appropriately.

Implementation

The HR Request Tool was implemented in a few weeks. Its level of customization and flexibility allowed Vancity system administrator to manage and configure the application themselves without the need for any technical knowledge. Staff quickly adopted the new tool with ease.

Flexible workflow and Business Processes

Vancity complex business processes, email notifications and requests routing were implemented as desired. Employees receive personalized responses to their requests. Depending on the type of request, each employee query is routed and assigned automatically to the correct staff and/or department.

Security and confidentiality

Sensitive information is securely stored. Employees and staff are able to access information on a needs basis only. Access rights are defined to guarantee high level of confidentiality.

About CustomAnswers

CustomAnswers, a leader in Customer Relationship Management (CRM), offers a central system that manages and improves all inbound and outbound Customer interactions.

Delivered as a Software-as-a-Service (SaaS), CustomAnswers Solutions empowers organization of all sizes to provide outstanding Customer Service.

Founded in 2001, CustomAnswers are flexible, powerful, intuitive and easy to use.

Visit www.CustomAnswers.com for more information

“We are extremely happy with the results. Our volume of email is drastically reduced. The portal is delivering its promises and the high level of customization allowed us to comply to our business processes. We are now exceeding our service level agreement.”

Belinda Neumann
HR Tools Specialist

