

# Orange County's Credit Union

## Opportunity

Orange County's Credit Union (OCCU) is a not-for-profit credit union in California, serving individuals living or working in Orange, Los Angeles, Riverside, and San Bernardino counties.

OCCU operates seven branches that process a total of 216,150 transactions in a single month. That works out to approximately 31,000 transactions per branch. At the same time, the credit union also experiences high volumes which turns the efficient scheduling of employees, who were shared by the contact center and branch, into a constant struggle. As a result, branch managers struggle with short-staffing issues, as a priority was given to the contact center. A better solution was required.

A decision was made to search for a solution that was flexible and included features that OCCU required.

## Solution

OCCU evaluated multiple workforce management solutions. Most vendors were unable to offer a flexible solution for both agent and teller scheduling that OCCU desired. OCCU selected Verint® Monet Workforce Management™. OCCU's technology platform included Avaya for all PBX and phone-related systems, Windows 2000, XP Systems for branch transactions, CentreVu Supervisor for call center reporting, T1 lines for data, and VoIP for voice.

## Benefits

The Verint Monet Workforce Management solution streamlined and improved forecasting and scheduling, resulting in shorter call times and improved service levels. Verint Monet Workforce Management took the guesswork out of staffing, which allowed OCCU to reassign employees as needed to eliminate coverage gaps. Best of all, it did this while also achieving full ROI in less than one year.

**VERINT.**  
**MONET**

## Customer Success Story



## Solutions

Verint® Monet  
Workforce Management™



## Industry

Credit Union



## Region

Americas

## Results

- Saved at least \$25,000 by eliminating the guesswork from profitability analyses and scheduling.
- Improved service levels by 5%.
- Improved conversion rate.



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Verint Monet Workforce Management delivered a unique feature set that improved OCCU's efficiency. For instance, the capability to forecast, modify, and monitor agent occupancy rates is displayed next to the current call history and service level objectives. This allows for even greater contact center flexibility during the agent scheduling and adherence process.

Verint Monet Workforce Management also enabled contact center managers to determine the exact cost of existing schedules as well as planned schedule changes. The system automatically models and balances improved service levels and reduces customer wait time against the necessary cost to provide it.

Other benefits include:

- Exception planner allows recurring exceptions and mid-day exceptions to be automatically scheduled, taking all exceptions into account when choosing shifts and scheduling breaks.
- Availability calendar permits contact center managers to see how existing exceptions affect staff availability. Managers can select any set of dates from the entire year and view agent requirements and availability, along with the number of exception hours, broken down both by agent and exception type.
- Forecasting capability revealed that experienced agents worked the early shift while peak traffic came later in the day, resulting in longer call times and plummeting service levels. Management changed schedules to keep more experienced agents working later hours.
- Shift creation is individualized, and special needs were more easily handled with the graphical roster report.
- By adding Verint Monet Workforce Management, branch managers removed the guess work from staffing. Every half hour, transactions are uploaded to the solution and available for analysis. Eventually, if one branch becomes overstaffed on a particular day, OCCU will be able to use the system to reassign that employee to another branch that is running short.
- Verint Monet Workforce Management has, according to OCCU, saved at least \$25,000 by eliminating the guesswork from profitability analyses and scheduling, creating an ROI of less than one year. Service levels have also been improved by at least five percent.



Learn more about  
**Verint Customer Engagement Solutions**  
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