Soo Co-Op Credit Union - Staff Tracking

Upper Peninsula's Primary Financial Institution

Soo Co-op Credit Union is a full-service retail credit union with seven branches in northern Michigan. Soo Co-op offers deposit and loan products as well MasterCard debit cards and VISA gift cards. Two subsidiary companies offer financial services and insurance products at the main branch. Soo Co-op employs approximately 70 workers.

Coordinating Employees at 7 Branches

In 2005, Rachel Causley, Branch Manager, needed a better way to locate employees in other branches. In a banking environment where excellent customer service is vital, teamwork among branch employees is a necessary component. Causley found that customer service was suffering at the teller line. For example, if a customer wanted to find out the status of his loan application, the teller might pick up the phone to see if the loan officer is available. If the loan officer does not pick up, the customer either had to wait or leave without his answer. "We'd just call and leave a message," said Causley.

At a bank, customers in a teller line do not want to spend time waiting just to have a quick question answered. Because banking transactions can be done at home or at an ATM, customers at the teller line often have more involved questions that caused them to come into the bank. If the teller cannot answer the question, customer service suffers.

The EIOBoard Solution

Soo Co-op needed a simple solution to allow tellers and other employees to quickly locate each other. Even if a teller could not help a customer, they wanted to at least let the customer know when to expect an answer. That way, the customer could choose whether to call back, wait for a phone call, or return to the bank.

To seek out a solution, Causley searched online. Her search resulted in connecting with Savance, a network and software provider that offers solutions that automate business functions. Specifically, Causley was interested in Savance's EIOBoard (electronic in/out board), a software package that allows users to share their in-office status with everyone in the company. However, what employees found especially useful was the private instant messaging (PIM) feature , saving the tellers from having to pick up the phone when they needed a quick answer from a manager or loan officer. This feature quickly became a favorite for Soo Co-op employees.

Location: Michigan

# of employees: 70+

EIOBoard products used:
Browser Interface, Outlook Add-in, Private Instant Messaging

Customer since: May, 2005

Key benefits:

- Faster communication
- Improved staff efficiency
- Enhanced customer service

"Now our branch employees can work in a more efficient way,"

- Rachel Causley
Branch Manager

Website: www.soocoop.com

Online Access to EIOBoard

Soo Co-op chose EIOBoard's Browser Interface to access the EIOBoard. With the Browser Interface, there is no software to install as the data resides on Savance's server. Users can log on to the EIOBoard from any computer connected to the Internet. Soo Co-op employees can quickly look at the EIOBoard to find another employee. If they see that they are out of the office, they can send text message to their phone.The text messaging feature saves emails and phone calls that have to wait until the employee gets back to their desk.

We Use Outlook on a Daily Basis

Soo Co-op also uses the Outlook Add-in, which interfaces with Microsoft Outlook so users can change their status while checking their email. Not all employees use the Outlook Add-in, as it is most useful for those that work at a desk. Causley estimates that approximately half of Soo Co-op's users access the EIOBoard with Outlook. "Tellers move from station to station, so the browser application is more convenient for them," she explains.

Implementation Challenges

Because Soo Co-op had minimal software to install, implementing the EIOBoard was a straightforward task of setting up each user with sign-in information. The biggest problem was that some were using the Outlook interface while others were using the Browser Interface, and both did not have the same functionality. Specifically, the Private Instant Messaging (PIM) was not available for the Browser Interface. *Savance has since upgraded the Browser Interface so that all employees at Soo Co-op could communicate with each other using the PIM.

Overall Results

Soo Co-op has seen noticeable improvements in their daily communication and efficiency. "It's really handy now that we can get a hold of people with the chat feature," explains Causley. The tellers can now send a quick note using the EIOBoard to another employee, especially convenient when a customer is standing in front of them waiting for an answer.

With seven branches, employees no longer have to pick up the phone to find out if someone is available. Instead, they can check the EIOBoard before calling. They now have several communication options available. "Managers are thankful not to have to depend on email as much," says Causley. This way, everyone is more productive, enabling quick questions to be answered without having to go through email messages, which can waste time. "Now our branch employees can work in a more efficient way," Causley says.