



# Streamlined Operations Creates Better Member Experience

## OVERVIEW

### Challenges

- Fragmented and disconnected knowledge base
- Out of date and difficult to use forms and procedures
- Lack of documentation on critical procedures
- No tracking process for updates and revisions of policies and procedures

### Benefits

- Achieving consistency of content and information across departments
- Able to streamline a complex database
- Faster system-wide deployment of processes
- Increased employee productivity and job satisfaction
- Better member experience

## Happier Members, Higher Employee Job Satisfaction

Founded in 1952 as an occupational-based credit union for employees of the New England Electric System, Central One Federal Credit Union has grown into one of the largest federal credit unions in Central Massachusetts. Central One offers a full range of deposit and lending products with access through branches, extensive ATM networks, Members Support Center and the Internet.

Central One needed to modernize. Years of compiling changing policies, processes and regulatory requirements had created a fragmented and unwieldy database of information for the call center and retail banking staff to handle.

“We learned that the procedures that were there were not complete. There was no tracking method to keep things updated,” explained Christine Bates, assistant Vice President.

The Central One team had seen other vendors at a local conference but when they saw Panviva, they said: “We need to have this.” They arranged for a demo and found Panviva was not only able to address their needs for a centralized data repository but even more to help the call center staff streamline procedures and revise out of date forms.

## Comforting Members in their Time of Need

One of the most critical areas addressed by the move to Panviva was the change in the member death notification form and processes. “The first procedure that was put in Panviva was death notification so front line staff could deal with a very sensitive topic. They were concerned about dealing with members, making sure they were doing and saying the right thing. Now Agents can focus on empathy and reassurance and not worry about what they need to do with the form,” Bates said.

Death notification was just the first step in the evolution. Panviva has helped Central One evaluate and change many of its popular forms including address changes and the Ownership User Designation Form.

“We learned that we needed to take a real hard look at what we had and ask: Do we



*“We initially thought that Panviva would get all our information in one place. What we found was that we were able to reduce steps and create better efficiencies on all procedures; to eliminate and streamline everything.”*

*-Christine Bates, Assistant Vice President, Central One*



really need to save this form? Once we made the changes, we heard from frontline staff. 'Thanks. We really hated that form,'" Bates added.

## Ease of Installation, Ease of Use

To implement Panviva, Central One concentrated on the top 20 pain points for their staff. Bates and her associate Project Manager Sandy Dunay, found the entire Panviva team from sales to support to be easy to work with, especially when it came to the low IT installation requirements.

"From a project POV, the fact that Panviva is cloud-based with minimal IT needed. That was a breath of fresh air," Bates said.

After a number of rolling releases to their users, Bates said Central One is already seeing great results:



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*"Panviva has reduced errors and keeps people accountable. Members are happier. Things are getting done right the first time."*

*Panviva will transform your customer experience! Learn more:*

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# PANVIVA

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