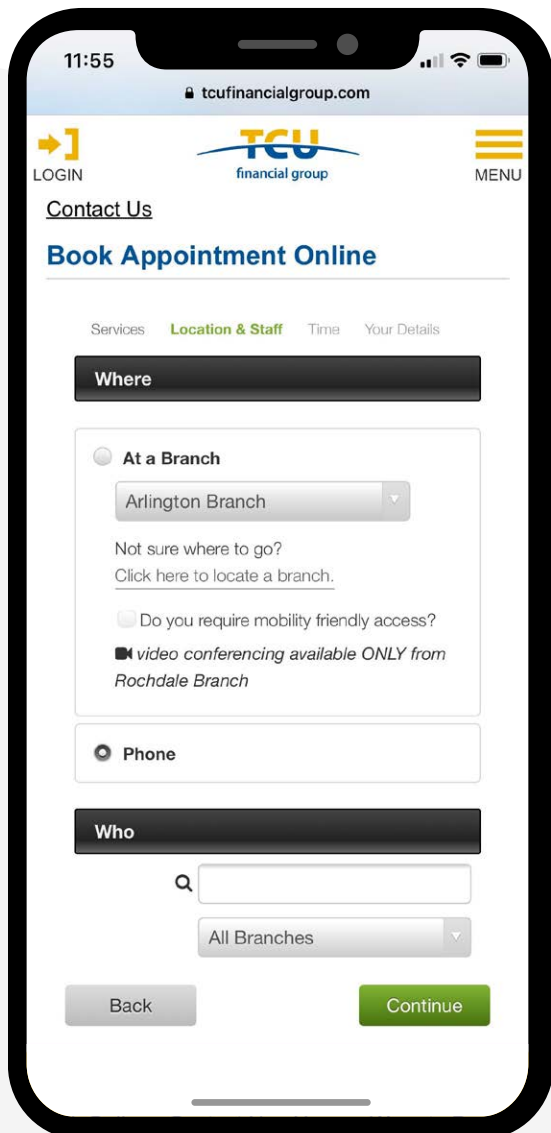# How TCU Financial Group Elevated Their Contact Center Scheduling Process

Overview

TCU Financial Group

TCU Financial Group is a Saskatchewan based credit union that provides a suite of financial products and services across all 5 of its branches throughout the province. TCU Financial Group is dedicated to providing outstanding service by understanding member needs and providing convenient products and services that are easy to use and understand.

Challenge

Scheduling Appointments Across Locations and Services

TCU Financial Group was looking for a contact center scheduling solution to better serve their members across multiple locations and with varying service options. As they grew their online presence, their previous scheduler proved to be too basic, and couldn't adapt to their changing needs. They wanted an update that would provide the ability to connect members with an account manager or wealth advisor through their expanding delivery channels.
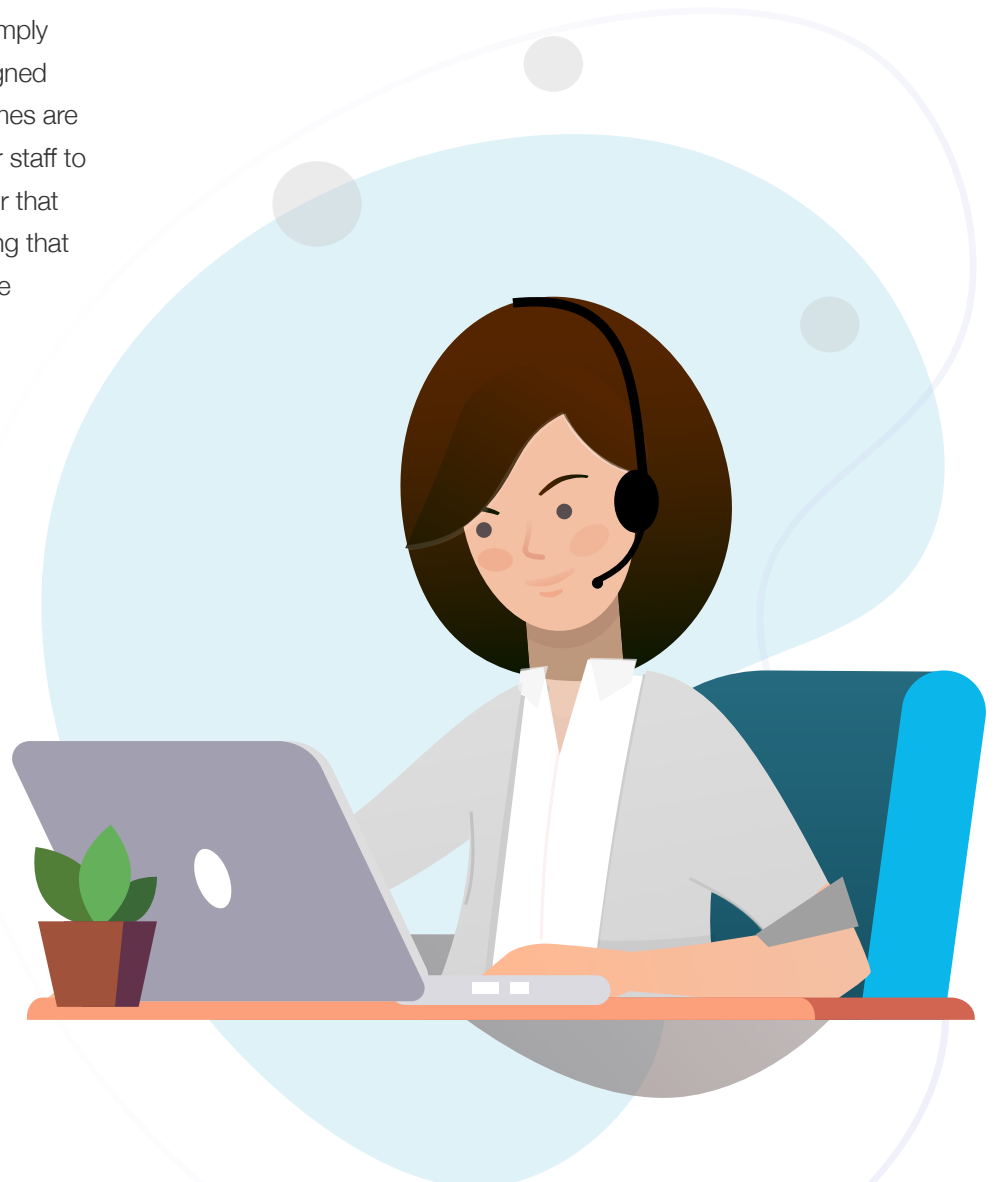
Solution

A Scheduling Platform Made for Contact Centers

The TCU Financial Group contact center handles a high volume of calls every day. Common reasons for members to call in include booking appointments, making scheduling changes or requests to speak with an account manager. Now, with Coconut Software's scheduling solution in place, staff are able to quickly view each account manager's availability and manage all of their schedules at every location, all from one screen.

The contact center staff utilize the Coconut Day View to see all account managers working at a specific branch. To schedule an appointment, they simply pull up the member's home branch and assigned account manager's schedule to view what times are available. Coconut only allows contact center staff to book appointments with an account manager that provides the service being requested, ensuring that members are always booked with appropriate staff. This way, if the member's assigned account manager doesn't perform the service requested, contact center staff can easily find an alternative account manager at their home branch.

Each appointment also has a note section that allows the contact center to add additional information that may have been collected during the call for the advisors to reference before or during the appointment. This allows advisors to better prepare for specific needs or requests, creating a personalized and responsive experience that is highly appreciated by members.

TCU Financial Group has also found the tool very useful for helping manage some of the incoming emails. Often members will send their completed paperwork to the organization's corporate email account, rather than their specific account manager, which could create confusion and delays when trying to locate the appropriate staff member to forward it to. By utilizing search in the client logs, staff are now able to look up the member's appointment history and confirm where the paperwork needs to go, getting it to the right person far more quickly.

Results

How TCU Financial Increased Efficiency and Satisfaction

As a result of implementing Coconut Software's appointment management solutions, TCU Financial Group has greatly increased their contact center efficiency and customer satisfaction by having real-time schedule information, paired with more accurate booking capabilities and the ability to note key information on the appointment available to staff.

Coconut Software's tailored solution allows TCU Financial Group contact center staff to easily navigate between multiple locations and advisors. By simply toggling between locations or clicking through future dates to see availability, it provides the most up to date access to their account managers' schedules. The company settings also allow TCU Financial Group to assign specialized services to specific staff types, as well as set the appropriate time required for each of those services. With these capabilities, it has eliminated the need for contact center staff to know which account managers perform which services, ensuring that members are booked with the right person every time, while also ensuring that the correct amount of time is scheduled to address the member's needs.

> "Coconut has allowed our contact centre to easily see who is available at each location and effectively book appointments with the appropriate specialist. By including an email reminder, we ensure our members know exactly when and where their meeting is and what to bring to the appointment. Offering these kinds of inspired services assist TCU Financial Group in providing an exceptional Member Experience."

TCU financial group

Ellen Crowder

MemberLine Supervisor, TCU Financial Group

About Coconut Software

Coconut Software is transforming how financial institutions engage with their customers by allowing them to effortlessly manage on-demand and pre-booked appointments with real-time insights to optimize results. Working with financial services, like Jackson Hewitt, First West, Connect First, and RBC, we understand that your enterprise scheduling needs are complex and we are committed to delivering a premium experience to each of our valued clients.

Visit: coconutsoftware.com or call 1-888-257-1309