



TRUSTONE FINANCIAL CREDIT UNION

TruStone Financial Credit Union is a not-for-profit financial institution based in Minneapolis, with \$4 billion in assets, 650 employees, 23 branches, and more than 200,000 members across central Minnesota and eastern Wisconsin.

AT A GLANCE

TruStone's central mission is to create exceptional financial experiences for its members. A 2021 merger with another organization brought together two client bases, virtually doubling their membership overnight to become Minnesota's second-biggest credit union. TruStone needed a communications partner to provide stability for their members and staff through a transition period and build a foundation for future growth.

GOALS

TruStone's call center was crucial to its operations as it supported clients from the two credit unions through the merger. Their priority was to provide excellent, continuous customer service to their newly expanded membership. The contact center system had to enable them to give back more to their members through reliability and efficiency. As an inherently collaborative institution, finding a provider who would be a true partner in innovation at the forefront of financial communications technology was essential.

RESULTS

During the RFP process, Mitel MiContact Center stood out to TruStone with concrete use cases that became the roadmap for supporting members through the merger and beyond.

An initial "health check" of the call center environment identified optimizations to help team members to be more successful and efficient with workforce resources. Metrics, dashboards, and API integration with other systems allowed TruStone's team to keep a finger on the pulse of communications across the board.

Once the merger was complete, the focus shifted to innovation. TruStone brought Mitel partner BSB Communications, Inc. on board to provide expert guidance and suggestions as they explored new ways to get the best service to their clients. BSB Communications was a true partner, helping TruStone identify the technology that would best meet their needs.

TruStone, BSB Communications, and Mitel have developed omnichannel solutions like queue customization and passcode features to increase security, reduce handle time, and improve the customer experience. The partnership has allowed both companies to expand their capabilities and establish long-range planning for future enhancements.

CLICK BOXES BELOW



FINANCIAL SERVICES

CONTACT CENTER

PREMISE TO CLOUD



Gary Jeter
CTO, TruStone Financial

It's been a true partnership. They're not just trying to sell us the latest and greatest product but finding what fits us. **I feel like Mitel has our back.**



Jill Schaffler
Vice President, TruStone Financial

It was important to us that we found an actual partner to talk to us about new technologies and **identify where we can advance or scale.**

