

# Credit Union Communications Checklist

Ensure both flexibility and compliance while taking care of members

## A FULLY INTEGRATED CLOUD COMMUNICATIONS PLATFORM EMPOWERS YOUR EMPLOYEES TO SERVE MEMBERS FROM WHEREVER, WHILE ALSO SUPPORTING YOUR COMPLIANCE AND SECURITY NEEDS:

- Help customers help themselves with basic tasks – such as checking account balances – freeing member service agents to spend time on more-complex needs.
- Members see your business phone number whether your employees are connecting with them from home, via mobile phone, or from the office.
- Your service reps can get real-time customer insights for quick context, helping them deliver more – informed responses that shorten resolution times.
- Manage audits more effectively when member insights for quick context, helping them deliver more-informed responses that shorten resolution times.



**ONE COMMUNICATIONS PLATFORM - ONE LOW MONTHLY RATE**  
PHONE | PHONE | MEET | CHAT | COLLABORATE | ENGAGE

## COMMON ISSUES FACING CREDIT UNIONS

- Members expect speed and convenience in every interaction. Your communications technology needs to empower service reps to deliver quick, high-value member service through any channel, every time.
- Pandemic-driven hybrid work models require communications systems that support employees working from wherever.
- Credit unions are subject to regular audits to ensure proper compliance and risk management.
- Legacy phone systems are expensive to maintain, making cost-effective cloud communication systems more appealing.

## WE HAVE THE EXPERTISE, EXPERIENCE, AND COMMUNICATIONS PLATFORM TO HELP YOUR CREDIT UNION THRIVE IN THIS NEW ENVIRONMENT.

	YOUR NEEDS	OUR SOLUTIONS
DELIVER SUPERIOR MEMBER EXPERIENCE	<ul style="list-style-type: none"> <li><input type="checkbox"/> Communicate seamlessly through member-centric channels.</li> <li><input type="checkbox"/> Meet member needs quickly with the right resources or service rep.</li> <li><input type="checkbox"/> Accommodate members who are digitally native and expect more.</li> <li><input type="checkbox"/> Make sure members don't have to repeat themselves each time they contact you about a single issue.</li> <li><input type="checkbox"/> Extend reach and facilitate faster response times for member inquiries.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Elevate integrates voice, chat, and video conferencing interactions on one platform.</li> <li>✓ With Contact Center, you can easily customize call flow to assign the right agent at the right time, and QA features deliver exceptional results.</li> <li>✓ Turn your member service capability into an outreach powerhouse with dynamic notifications.</li> <li>✓ Contact Center's real-time insights get service reps into context quickly, helping them to deliver more-informed responses that shorten times to resolution. Plus, deep historical reporting helps improve future interactions.</li> <li>✓ Contact Center's dynamic notifications proactively send reminders while respecting members' preferences.</li> </ul>
MOBILITY AND FLEXIBILITY	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure employees can be productive whether they work at home, in the office, while commuting, or from some mix of locations.</li> <li><input type="checkbox"/> Give members a seamless and consistent communications experience across channels and over time.</li> <li><input type="checkbox"/> Allow video conferencing participants to join meetings from any location.</li> <li><input type="checkbox"/> Ensure members receive a consistent experience.</li> <li><input type="checkbox"/> Accommodate distributed service rep teams and multiple branch locations.</li> </ul>	<ul style="list-style-type: none"> <li>✓ As a tightly integrated platform, Elevate ensures consistent communications regardless of where your employees are.</li> <li>✓ Chat and SMS automatically synchronize across mobile and desktop apps, and real-time member insights speed response time.</li> <li>✓ Elevate lets meeting participants join from mobile phones, desktops, and laptops.</li> <li>✓ Voice, chat, and email queues combine into a single omni-channel experience.</li> <li>✓ Enable anytime, anywhere communications from any device.</li> </ul>

	YOUR NEEDS	OUR SOLUTIONS
SECURE CLIENT COMMUNICATIONS AND INDUSTRY COMPLIANCE	<input type="checkbox"/> Manage risk by ensuring cloud service providers are independently audited.	✓ Our solution is SOC 2 audited, which attests to our high security standards – for our products, networks, infrastructure, and privacy protection.
	<input type="checkbox"/> Protect or encrypt confidential client correspondence, files, text messages, voicemails, and email.	✓ Emails, files, video conference recordings, and more can be secured at rest and while in transit.
	<input type="checkbox"/> Share documents securely.	✓ Account-level encryption keys secure stored documents, and SSL/TLS secures documents as you share them.
	<input type="checkbox"/> Choose cloud service providers with high uptime SLAs.	✓ Our cloud is purpose-built for 99.999% uptime with a financially backed SLA.
	<input type="checkbox"/> Ease the audit process with configurable file retention policies, long-term storage, and by enabling access to archives by specific roles.	✓ Elevate offers secure, low-cost, and long-term storage with support for and indexing of relevant data types and formats and role-based permissions for accessing archives
	<input type="checkbox"/> Avoid use of and protect disclosure of employee mobile phone numbers.	✓ Callers see your business phone number, whether employees are engaging from their mobile phones, desktop phones, or a remote service location.
	<input type="checkbox"/> Have confidence that your cloud services providers take security measures that facilitate regulatory compliance Choose cloud service providers with high uptime SLAs.	✓ Our solution is independently audited and offers security protection across seven pillars.
PUT AN END TO LEGACY PHONE SYSTEM COSTS	<input type="checkbox"/> Protect your business files against malware, viruses, and cyber crime.	✓ Elevate quarantines infected files and integrates Bitdefender anti-malware capability.
	<input type="checkbox"/> Ensure cost efficient communications and collaboration without sacrificing quality or features.	✓ Elevate offers 90+ enterprise-grade calling features and excellent network call quality and uptime. ✓ Savings of up to 50% on monthly phone bills compared with traditional phone services.
	<input type="checkbox"/> Easier configuration and deployment.	✓ Flat, per-user rates with no annual contracts, no hidden fees, and no hardware to buy, manage install, or replace. ✓ A single web-based portal lets you configure the system and manage call reporting.
	<input type="checkbox"/> Supplement desk phones with other communication channels.	✓ Elevate tightly integrates desk phones, mobile phones, chat, SMS, video conferencing, screen sharing, file sharing, and file backup to facilitate increased collaboration and productivity.
	<input type="checkbox"/> Ensure business continuity.	✓ Elevate automatically rings all your end points in the event you don't answer, and routes calls to any number you choose.

Contact us today to find out how a fully integrated cloud communications platform can help your credit union thrive and grow.