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	☐ Communicate seamlessly through member-centric channels.	✔ Elevate integrates voice, chat, and video conferencing interactions on one platform.
	☐ Meet member needs quickly with the right resources or service rep.	✔ With Contact Center, you can easily customize call flow to assign the right agent at the right time, and QA features deliver exceptional results.
	☐ Accommodate members who are digitally native and expect more.	✔ Turn your member service capability into an outreach powerhouse with dynamic notifications.
	☐ Make sure members don't have to repeat themselves each time they contact you about a single issue.	✔ 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.
	☐ Extend reach and facilitate faster response times for member inquiries.	✔ Contact Center's dynamic notifications proactively send reminders while respecting members' preferences.
MOBILITY AND FLEXIBILITY	☐ Ensure employees can be productive whether they work at home, in the office, while commuting, or from some mix of locations.	✔ As a tightly integrated platform, Elevate ensures consistent communications regardless of where your employees are.
	☐ Give members a seamless and consistent communications experience across channels and over time.	✔ Chat and SMS automatically synchronize across mobile and desktop apps, and real-time member insights speed response time.
	☐ Allow video conferencing participants to join meetings from any location.	✔ Elevate lets meeting participants join from mobile phones, desktops, and laptops.
	☐ Ensure members receive a consistent experience.	✔ Voice, chat, and email queues combine into a single omni-channel experience.
	☐ Accommodate distributed service rep teams and multiple branch locations.	✔ Enable anytime, anywhere communications from any device.

YOUR NEEDS	OUR SOLUTIONS

SECURE CLIENT COMMUNICATIONS AND INDUSTRY COMPLIANCE

☐ 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.
☐ 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.
☐ Share documents securely.	✔ Account-level encryption keys secure stored documents, and SSL/TLS secures documents as you share them.
☐ Choose cloud service providers with high uptime SLAs.	✔ Our cloud is purpose-built for 99.999% uptime with a financially backed SLA.
☐ 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
☐ 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.
☐ 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.
☐ Protect your business files against malware, viruses, and cyber crime.	✔ Elevate quarantines infected files and integrates Bitdefender anti-malware capability.

PUT AN END TO LEGACY PHONE SYSTEM COSTS

☐ 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.
	✔ Flat, per-user rates with no annual contracts, no hidden fees, and no hardware to buy, manage install, or replace.
☐ Easier configuration and deployment.	✔ A single web-based portal lets you configure the system and manage call reporting.
☐ 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.
☐ 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.

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