

FMSI Case Study Library

CAMPUS USA Credit Union Throws Away Lobby Clipboards and Improves Staffing Decisions

A Lobby Tracking System™(LTS) Case Study



CAMPUS USA Credit Union, originally chartered in 1935, is a billion dollar credit union offering a diverse range of financial products with 13 locations in North Central Florida. Like many credit unions CAMPUS historically had utilized a sign-in clipboard for their lobbies. This process had its faults, but is what many credit unions have been using for years - until recently. CAMPUS implemented Financial Management Solutions' (FMSI) Lobby Tracking System™ (LTS) in August 2009. LTS not only improved their wait times, but it also gave them tremendous reporting capabilities, which helped them make more informed staffing decisions. Troy Battle, Operations Manager for CAMPUS USA Credit Union, recently praised the LTS solution by stating, "LTS has proven to be a great investment for CAMPUS."

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-Troy Battle
Operations Manager,
CAMPUS USA Credit Union

Improving the Member Sign-in Process

Due to the layout of several of their branches, Member Service Representatives (MSR's) have little to no visibility of the lobby waiting area from their desks. Getting up to check the lobby was distracting and interrupted their work flow. They needed a desktop integrated solution that automatically alerted them of a member in the lobby, and FMSI's LTS solution was exactly what they were looking for.

With the LTS solution, when a member arrives in the lobby they enter their information into a secure computer kiosk. Immediately, all MSR's and management can see the newly arrived member through the LTS queue management tool on their desktops. If a member is waiting for longer than a designated amount of time, "alert" boxes will pop up on each MSR's and management's screen, immediately notifying them of the situation. In addition, displayed next to each member's name in the queue is what product(s) or service(s) they are there to discuss. The LTS solution significantly improved CAMPUS' member sign-in process.

Making More Informed Staffing Decisions

The LTS reporting feature changed the way CAMPUS made hiring decisions. A common problem Battle had realized was that 9 out of 10 of his branch managers would ask for a new MSR when one left, regardless of productivity needs. The LTS reports allowed him to better understand productivity needs per branch. For example, recently Battle was approached by one of his branch managers to bring on a new MSR due to attrition. Battle considered a couple of options that may have lead to staffing efficiency

improvements. The first was to transfer an MSR from a branch that he suspected was not as busy. The second was to not hire a new MSR for the branch altogether and let the remaining MSR's pick up the added workload. Without LTS, Battle historically had to rely on an "educated guess". With LTS, he was able to analyze productivity and traffic reports for both branches in question and quickly realized that the best route to go was to hire a new MSR altogether. This critical detailed information prevented him from making a decision that could have significantly reduced member service levels at one of his branches.

Another way CAMPUS benefitted from the LTS reporting was by scheduling based on historic products sold averages. For example, during the beginning of a new school year CAMPUS gets a huge influx of students opening new accounts. With the data from the LTS reports they were able to determine that they had spent an average of 35-45 minutes opening a new account. Previously, they had guessed that it would take 20 minutes to open an account. In the past, this estimate would have led to under staffing and potential poor service during a critical time of the year. In addition, LTS also helped them staff appropriately on Saturdays. Battle explained, "The Lobby Tracking System™ reports were proving that more accounts were being opened during the start of the school year and on Saturdays than we expected. So we staffed based on these numbers and the results significantly increased our productivity."

LTS Tips and Insights from the Operations Manager at CAMPUS USA Credit Union

- Our Branch Managers have really enjoyed using the LTS solution. They would be lost without it.
- Training our staff to use the system only took about 30 minutes. We were up and running in no time. We only gave the staff a day to test and become familiar with the system and successfully went live the very next day.
- Reach out to the FMSI staff. Our support has been outstanding. They have always been prompt and reliable.

CAMPUS USA Credit Union has come a long way since its clipboard days. With a substantially improved member sign-in process and on-demand reports available to assist them in making more informed decisions, FMSI's Lobby Tracking System™ has been a "great investment" for them and their members.

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