

## Soaring to New Heights with the FMSI Lobby Tracking System™

### *The Story of a Credit Union's Pursuit of a Quality Lobby Experience*

Located in Dayton, Ohio home of the Wright Brothers, the Wright-Patt Credit Union (WPCU) over the last year has soared to new performance management heights with the Financial Management Solutions, Inc. (FMSI) [Lobby Tracking System™](#) (LTS). Much like Orville and Wilbur's dedication towards historic innovation, Wright-Patt Credit Union has a serious commitment in having a balanced support for all three stakeholders of their organization including: the credit union itself, their employees and their members. An area that plays a major role in all three interests is the lobby experience. LTS armed WPCU with the decision-support information they required to greatly surpass their ideal lobby experience ambitions.

"FMSI's Lobby Tracking System™ gave me the data I needed to better analyze branch comparisons and make more informed and confident decisions. Over the past year I have utilized the LTS management report on a weekly basis." - VP of Membership and Development at WPCU

#### **Improvements to the Sign-in and Service Tracking Process**

Historically, WPCU and its 22 locations had a sign-in clipboard for tracking members waiting in the lobby. This process was chaotic and could likely result in poor service. For example, they had trouble tracking wait times. Members would sign the clipboard and could potentially wait 30 minutes without a manager being aware of the situation. Another example was the inability to know which product(s) the members were there to discuss, which many times had a negative impact on service - due to a discrepancy in Member Service Representative (MSR) product selling clearance levels not matching the member's product. To top it off, the clipboard caused some members to have major concerns over privacy. Needless to say, WPCU's management team recognized that there was some room for improvement.

When WPCU implemented the LTS solution, it immediately allowed for real-time tracking of all members – from the minute they walked in the door - to the minute they left. It was the perfect solution for identifying and limiting WPCU's wait time issues, product assignment service issues and member privacy concerns. So how does LTS work? Essentially, when a member arrives in the lobby they enter their information into a secure computer or a greeter types in their information. Immediately, all MSRs and management can see the member through the LTS queue management tool. 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. Furthermore, displayed next to each member name in the queue is what product(s) they are there to discuss. With these LTS enhancements, WPCU was able to dramatically improve their lobby sign-in and service tracking process.

### **Management Reporting**

For years, Jeff Carpenter the VP of Membership and Development at WPCU, had to rely on what he described as a “gut feel” when comparing the performances of different MSR’s and branches. He simply did not have the concrete data to support his decisions and described this experience by stating, “I would hear stories from one branch about how great their lobby experience was and I would also hear different stories from another branch about how poor their lobby experience was. One branch was contempt with the number of MSR’s they had and the other was asking to hire more MSR’s. Without regular and precise performance data such as the number of products sold and how long the average wait times were, it was very difficult to discern the discrepancies between the two branches. FMSI’s Lobby Tracking System™ gave me the data I needed to better analyze the branch comparisons and make more informed and confident decisions. Over the past year I have utilized the LTS management report on a weekly basis.”

### **LTS Best Practices from the VP of Membership and Development at WPCU**

- Have a weekly conference call with your management team to review the LTS data. With all the emails they receive in a week, this call highlights the most important topics.
- During the sign-in process, train your MSR’s to avoid clicking “accept” before they actually have a member in their office. A potential issue can occur when two MSR’s go to service the same member, which can result with the member ending up in the system with the wrong MSR.
- Pick up the phone and call FMSI’s Client Services team. They not only were extremely helpful during the roll-out of the LTS product, but their general expertise and specific insights into the credit union world have been invaluable.

With an improved sign-in and service tracking process combined with detailed monthly management reports, Wright-Patt Credit Union has truly soared to new heights. Just as Orville and Wilbur’s commitment to flying perfection revolutionized the world, Wright-Patt Credit Union’s balanced dedication to all 3 stakeholders, blended with the powerful FMSI LTS solution, fundamentally refocused how they managed their lobby experience.

### About Wright-Patt Credit Union

Established in 1932, [Wright-Patt Credit Union](#) is a member-owned, not-for-profit financial cooperative proudly serving the Miami Valley with over 180,000 members and \$1.7 billion in assets. As a cooperative, Wright-Patt Credit Union joins members together, pooling financial resources to meet the needs of all. The pooled resources provide the capital to run a strong and efficient operation. Wright-Patt Credit Union is headquartered in Fairborn, Ohio, and has 22 Member Centers throughout Southwest Ohio. Wright-Patt Credit Union's mission is to help people through life by allowing members to achieve a greater degree of economic independence. Visit Wright-Patt Credit Union's website at [www.wpcu.coop](http://www.wpcu.coop) for more information.

### About Financial Management Solutions, Inc. (FMSI)

Located in Atlanta, GA and established in 1990 FMSI provides easy-to-use, yet sophisticated, systems – [The Teller Management System™](#) (TMS) and The Lobby Tracking System™ (LTS) – that allows you to manage and staff to meet service and sales needs like never before. We offer you the ability to schedule your team throughout your branch network, and to manage them through easy to read color graphics and succinct management reports.

FMSI helps enhance performance management information exclusively with financial institutions of all sizes throughout the United States. Visit the company's web site at [www.fmsi.com](http://www.fmsi.com) or call 877.887.3022 to schedule a complimentary online demonstration of The Lobby Tracking System™.

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