

FMSI Case Study Library

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.'s (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 the branch comparisons and make more informed and confident decisions."

- Jeff Carpenter

VP of Membership and Development

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 MSRs 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 content with the number of MSRs they had and the other was asking to hire more MSRs. 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 MSRs to avoid clicking “accept” before they actually have a member in their office. A potential issue can occur when two MSRs 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.

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VantagePoint

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