Project Brief - Financial - Servus Credit Union

Original Systems

- Cisco Finesse
- Verint (QM and speech)
- Excel (WFM)
- Doxim CRM

Current Systems

- Genesys Cloud CX
- Telecom Service by Star Telecom
- WFM solution for forecasting and scheduling
- MS Dynamics
- AWS Direct Connect

Business Challenges

- Tight timelines to migrate to new CCaaS platform (1 month), current ACD contract expired
- Poor member experiences due to lack of channels and obsolete technologies
- Mitigate risks during transition to new CCaaS platform
- Poor call quality and downtime from current provider affecting CX negatively
- Poor telecom support with long timeframes to resolve issues which prolonged negative CX
- Obsolete method of WFM with no forecasting available

Outcomes

- Developed and implemented a 3 phased, agile project plan to:
  - Meet urgent deadline to migrate like-for-like solution to Genesys Cloud CX in phase 1
  - Add all remaining existing functionality in phase 2
  - Plan for Future improvements in phase 3
  - Identify all possible risks
- Improved member experience with multiple channels for support
- Setup AWS Direct Connect for enhanced service, reliability and security
- Superb call quality with no downtime ensuring consistent quality customer experiences and reduced agent frustration
- Drastically improved WFM including scheduling and accurate forecasting