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Member Appointments and Branch Kiosks Take Service to Another Level at American Heritage Credit Union

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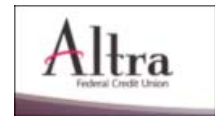
Dan Schwab, Vice President of Retail Operations at Altra Federal Credit Union

Credit Union:

Altra Federal Credit Union

Solution:

Better Lobby



Benefits:

- ❖ Well organized project management process
- ❖ Makes visitor check-in and service tracking much easier and faster
- ❖ Able to monitor and measure all types of staff and visitor activities

Providing an exceptional in-branch member experience for 98,000+ members in 17 branches spread across 7 states requires a robust visitor management and appointment handling platform. Altra Federal Credit Union is one credit union that is fully dedicated to delivering great service levels as evidenced by their Vision Statement: "Helping You Live Your Best Life." To help them fulfill this promise to their nearly one hundred thousand members, Altra has implemented the Credit Union industry-leading Better Lobby visitor management solution from Better Branches Technology.

Dan Schwaab, Vice President of Retail Operations at Altra Federal Credit Union, and his management team had a vision of a visitor management system that tightly integrated walk-in branch visitor interactions and member appointment handling. Dan, who has over 23 years of credit union experience in a wide range of roles, recalls that "we developed a detailed Request for Proposal that we sent out to 6 vendors, and that was accompanied by a very formal and organized approach to selecting a visitor management and appointment system." After a few months of stringent due diligence, Better Branches Technology emerged as the best choice. "We really liked the fact that Better Branches only works with credit unions and that they truly understand credit union operations," explains Dan.

Altra had a branch visitor check-in system in place that involved a combination of roving staff, emails, Instant Messaging and an employee intranet for notifying employees when members arrived for service. Altra has found that Better Lobby makes visitor check-in and service tracking much easier and faster, while providing members with their position "in line" and handy notifications to staff members. According to Dan, "we are really focused on providing stellar member service and we feel that the Better Lobby queueing and appointment system helps us achieve this goal, and it also gives us a competitive advantage."



As for the Better Lobby implementation, Dan describes it as “non-event. The project management process was great and our staff has really embraced the system.” As Altra discovered, Better Lobby is technically easy to deploy - no special client applications are needed. Since it is browser-based, staff learning curves are miniscule. As far as reporting goes, Dan states that “the built-in reports are excellent – we are now able to monitor and measure all types of staff and visitor activities, and the system helps create accountability.” Dan concludes that “working with the Better Branches team has been a great experience and we are excited about what our future partnership holds.”

Contact Information:



Better Branches LLC
85 W Combs Rd, #101-410
San Tan Valley, AZ 85140
866-444-8344
www.betterbranches.com

