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SESLOC Federal Credit Union Boosts Omni-Channel Member Service Levels with the Help of Better Lobby

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Rachel Nielson, VP of Operations at SESLOC FCU

Credit Union:
SESLOC Federal Credit Union

Solution:
Better Lobby

Benefits:

❖ **Enhanced member service in-branch, online & call center**

❖ **Microsoft Outlook integration & Windows single sign-on**

❖ **Extremely user friendly Self Check-in Kiosks**

In 1942, thirty two San Luis Obispo County, California school employees came together to pool $500 to form a new credit union. Six years later the acronym SESLOC was adopted, which stands for: School Employees of San Luis Obispo County. Today, with over 50,000 members and more than 75 years of service to the community, SESLOC retains its commitment to providing valued financial services and education with honesty and integrity to everyone who lives, works or attends school in San Luis Obispo and Northern Santa Barbara Counties. To help them deliver stellar service to their members, SESLOC Federal Credit Union chose Better Branches Technology as one of their prime technology partners. The credit union deployed many of Better Branches Technology's CU-specific software packages: Better Lobby/Main Service Queue, Self Check-in Kiosk, Branch Appointment Calendar, and Mobile Appointment Booking Tool.

Rachel Nielson, SESLOC's Vice President of Operations, explains the credit union's motivation for implementing Better Lobby: "We wanted to better serve our members at the first point of contact - whether that is face-to-face in the branch, over the phone in our contact center, or via our online/mobile channels." The $815 million asset CU was particularly searching for 3 specific features in a new visitor management/appointments system: 1) Microsoft Outlook integration, 2) an in-house implementation for security and compliance purposes, and 3) single sign-on integration with Windows. According to Rachel, "we performed due diligence on 3 vendors, but Better Branches was the only vendor that met those 3 requirements, plus they were the only provider that worked exclusively with credit unions." She adds that "we also liked the fact that all of their references spoke glowingly of them in general, but also how they all mentioned specifically how easy it was to work with them."

SESLOC prides themselves on running highly organized and rapid project implementations and the Better Lobby project fit their requirements and expectations perfectly. Rachel notes that "the implementation went great – both the Better Branches project management and IT team were very flexible and moved at our desired pace. We also

appreciated their individual attention – this is very rare and made for one of the best implementations ever for us." The CU opted for a phased rollout of Better Lobby, Wall Display and Kiosks to their 5 branches over a two week period, coupled with a mere 30 minutes of employee training that were needed on the intuitive browser-based Better Lobby software. The results were "fabulous" in Rachel's words; "both the staff and members love the system," says Rachel. Any fears that their members would have concerns about using the Self Check-in Kiosks were quickly extinguished when a 93 year old member proclaimed that "if I find it easy to use, then any-one can use it!"

The next phase of the Better Lobby rollout was the staff-facing Branch Appointment Calendar which quickly gained enthusiastic converts in the CU's contact center, lending department and business services group. Rachel states that "appointments have really streamlined our lending operations and made setting appointments for notary services so much better than our previous manual processes. The email and text notifications built in to Better Lobby have been extremely helpful in making sure that our member meetings go smoothly because both the members and our staff are well prepared for the appointment." Member service levels are also given a boost by the fact that Better Lobby supports integration with SESLOC's core system, e.g., staff can quickly use the Visit History feature in Better Lobby to easily lookup the member's past interactions by product/service, staff member, etc.

The final phase of the Better Lobby implementation was just occurring at press time: the Mobile Appointment Booking Tool that allows for one-on-one member booked appointments with CU staff to be scheduled using any recently released mobile device, tablet or computer. Rachel predicts that "we feel that our members will appreci-ate the convenience of self-booking appointments with us, and so far the rollout has gone very smoothly, just like all of the other Better Lobby module phases." She concludes that "we have never had a project where every-one was completely happy about using a new system – we have experienced nothing but positive feedback from all of our staff, as well as our members. We truly value our vendor relationships and strive to make them as cooperative as possible, and I have to say that our relationship with Better Branches Technology has been one of the best ever."

Contact Information: