



INTERACTIVE INTELLIGENCE®
Deliberately Innovative

Case Study

Contact Center Automation

- **Multichannel Recording & Quality Monitoring**
- Customer Feedback Management
- **Outbound/Blended Dialing & Campaign Management**
- Network-based Pre/Post-Call Routing
- Web Self-Service & Knowledge Management
- Workforce Management

Enterprise IP Telephony

Business Process Automation

Communications-as-a-Service

Summary

Customer: FORUM Credit Union



Headquarters: Indianapolis, IN

Industry: Financial services

Challenge: Replace multiple vendors with a single-vendor contact center solution. Eliminate dependence on hardware-based systems. Allow for in-house customization of features.

Solution: *Customer Interaction Center™* (CIC) is an all-in-one communications software suite that provides multichannel contact center automation and enterprise IP telephony functionality for mid-size to large organizations.

Vendors Replaced: Avaya, Mercom, Maxxar, LivePerson

Benefits:

- System maintenance costs reduced by 20 percent
- Less time and money spent on vendor management
- Enterprise-wide productivity increased using unified messaging



Credit Union Consolidates Communications Infrastructure with All-in-One IP Communications Software Suite

Open, single-platform software architecture results in reduced costs and improved customer service

About FORUM Credit Union

FORUM Credit Union has 12 branch locations offering anywhere access via the Web to its more than 100,000 members throughout central Indiana. FORUM offers a full suite of financial services, including home mortgages, auto loans, free checking, rewards checking, business checking, health savings accounts, investment planning, and insurance products. For more information about FORUM Credit Union, call 317-558-6000.

www.forumcu.com

The Challenge

With four vendors supplying the various components of FORUM Credit Union's hardware-based contact center infrastructure, the organization's technology decision-makers faced challenges not only in vendor management, but in updating and customizing contact center features. At the time, FORUM was using Avaya for its PBX, voicemail, and contact center systems; Mercom for its call recording system; Maxxar for its IVR system; and LivePerson for its online Web chat system.

Since FORUM's leasing contract with Avaya was also coming to an end, it seemed like the perfect time to explore the benefits of a single-vendor software solution.

"Avaya was a very closed system," said FORUM Credit Union's vice president of technology, Cameron Piercefield. For example, the credit union's 25 contact center agents, who either worked from the main office or branch offices, needed an automated dialer. However, Avaya couldn't provide a dialer that would work with FORUM's existing hardware.

In addition, any changes or customizations to existing systems required a costly onsite visit from the vendor. "We knew we wanted screen-pops in order to make it easier for our agents to have customer information at their fingertips as they began a call," Piercefield said. "But we couldn't find a cost-effective way to do it with Avaya, and there was no way to scale the system for growth. We would have had to buy new hardware, and all the hardware we had recently purchased for another upgrade would have been lost."

The Solution

To avoid the cost and complexity of managing solutions from so many different vendors, FORUM Credit Union sought a contact center system from one vendor that would offer all the required features – IVR, outbound dialing, recording and Web chat – and that could be customized in-house.

"We wanted a single point of contact instead of dealing with multiple vendors," Piercefield said. "We also wanted to break away from the dependency on hardware systems. And we wanted an open system that we could customize." FORUM also needed an automated dialer, which proved to be too expensive to purchase from Avaya, as well as screen-pops.



FORUM considered contact center solutions from about a dozen vendors, but narrowed down the search to three: Avaya, Cisco, and Interactive Intelligence. It ultimately selected the Interactive Intelligence solution, *Customer Interaction Center™* (CIC), based on its single-platform, all-in-one software architecture, according to Piercefield.

“We favored CIC immediately because it gave us all the features we needed running on a single platform,” he said. “Interactive Intelligence totally redefined communications by building an open, unified software solution from the ground up, instead of acquiring components from different vendors and trying to integrate them all together.”

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FORUM is using the Interactive Intelligence CIC software suite for outbound/blended dialing and campaign management; multichannel recording and quality monitoring; interactive voice response; automatic call distribution; Web chat; desktop softphone with call control; faxing; and unified messaging.

FORUM has also developed a speech-enabled IVR solution based on the CIC platform. “Because CIC is an open, software-based solution, we were able to customize the IVR to meet the unique needs of our customers,” Piercefield said. “We were able to move away from the proprietary, closed IVR solution, which was very expensive to maintain. This further enhanced the return on investment of our new IVR.”

The Benefits

“Using CIC to consolidate our multi-vendor solutions, we’ve been able to save 20 percent annually in costs associated with managing and maintaining the system,” Piercefield said. “And that doesn’t even include both cost and time savings associated with simplified vendor management.”

Feature-wise, the ability to use screen-pops across multiple database systems has resulted in improvements to customer service. “Our Avaya system couldn’t pull information from different databases,” Piercefield said. “Now our agents have information from our CRM and collections databases as soon as they pick up a call so they’re able to serve customers faster and more effectively. We only need to create the integration once, instead of creating separate integrations for each system.”

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FORUM has also integrated CIC with its proprietary member relationship management (MRM) tool, FOCUS, for further customer service enhancements. “The numbers for our quarterly member satisfaction survey continue to climb,” True said. “In a recent survey, 93 percent of members said they were either ‘satisfied’ or ‘extremely satisfied’ with our service.”

Thanks to CIC, FORUM Credit Union can now take advantage of the cost savings and other benefits associated with using remote agents. “Out of 25 agents, eight are now working from home and we expect that number to rise,” Piercefield said. “We couldn’t have accommodated remote agents with our previous hardware-based solution.”

Agents aren’t the only ones reaping the benefits of CIC. Some 300 business users at FORUM Credit Union are taking advantage of its unified messaging feature. “Everyone loves getting faxes, voice mail and email all delivered to their inbox,” Piercefield said. “It’s really added to their productivity. Plus we’re getting an even greater return on investment by being able to use CIC enterprise-wide.”



Interactive Intelligence Inc. (Nasdaq: ININ) offers unified business communications solutions for contact center automation, enterprise IP telephony, and business process automation. More than 3,500 organizations worldwide currently benefit from the company’s open, standards-based, all-in-one IP communications software suite, which can be deployed as a premise-based or communications-as-a-service (CaaS) solution.

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