



USC Credit Union

"Envoy helps reinforce our commitment to member experience and raises the bar in terms of professionalism. It's another way we communicate USC's excellence."

—Valerie Ives, Branch Manager, Campus Center

Commitment to member experience helps USCCU thrive

Started in 1972 by University of Southern California employees to fill a gap in the local banking marketplace, **USC Credit Union** (USCCU) has always aimed challenges to deliver just a little bit more to the Trojan Family with four branches throughout Los Angeles, in addition to a seasonal pop-up location.

"Envoy's visitor registration system streamlines the experience for visitors to our branches, especially in the summer when we get a flood of students signing up for new accounts. This means there can be as many as 100 people in a branch at once," said Valerie Ives, Branch Manager at USCCU's Campus Center.

In order to create the best member experience, USCCU took advantage of Envoy's flexibility to add a temporary pop-up branch on campus just for



Location

Los Angeles, CA



Visitors

60 per day



Branches using Envoy

4 branches



Industry

Financial Services



Favorite feature

Online Dashboard

capturing new account sign-ups during the summer. "All we need to do is put Envoy on an iPad at the front, and we're ready to go," she said.

Ensure that waiting members are taken care of

USCCU uses Envoy as the main gatekeeper for their account representatives. If someone wants to open an account or meet with a representative, they're directed to check in through Envoy. Once they've entered their personal information, they choose from a list of 25 options (Loans, Online Banking, New Account, etc.) to identify why they're there and, if they already have an appointment, who they're meeting with.

Account representatives are expected to constantly keep an eye on Envoy's online dashboard, which helps them keep track of waiting members. By **sorting signed-in visitors**, they can monitor the queue, identify who they can help, greet and remove that person from the list by signing them out in Envoy. "Our account representatives should always be aware of what's going on and who's left waiting," Ives said.

"We used to keep track of check-ins with a printed-out spreadsheet," Ives said. "We had no insight into what was going on and the receptionist was constantly running back and forth to check. Now she can spend time on more important tasks and still be confident that our members are getting the help they need as quickly as possible."

Make smarter decisions by gathering useful data

Not only has Envoy helped USCCU ditch the pen and paper sign-in, it's made it easy for Ives to analyze information and make branch improvements.

"When we were using the spreadsheet, we'd ask people the reason for their visit, but they could write whatever they wanted. It was hard to organize the data, and harder to actually get anything out of it," Ives said. "Now we have standardized options; the information is gathered in one place and it's easy to review."

By **exporting Envoy's data** into a spreadsheet program, Ives gets useful insights, including: average wait times, number of new accounts per week, busiest days, most popular services, and top account reps. Ives analyzes these data points to help her make improvements to the branch.

"For example, if I know certain days are consistently busier, I assign more reps to those shifts," she said. "Envoy also allows me to measure average wait times and quickly make adjustments."

Ives says Envoy has transformed reception from merely a function to a hub of business-critical member data. "We get more value from that position without the need to make any changes. Envoy gives us data we can use to inform important, everyday decisions."



Challenges

Up to 100 people in a branch during busy season

Need to set up pop-up branch for the summer

Difficult to gain insights from pen-and-paper sign in



Results

Ensures waiting members are taken care of

Can easily set up Envoy to streamline pop-up branch

Easy to analyze data for branch improvements