



An Integrated CRM

Built to Improve the Member Experience

"Ten out of ten. JourneyTeam is a true partner. From top to bottom, they are stacked with legitimate superstars who have endeavored to learn our business needs, bringing expertise and creative solutions along the way. They are honest, genuine and accessible. Partnering with JourneyTeam has allowed us to focus on the things that matter and not on the things that don't. It's easy to forget that they are an external partner and not part of our organization."

-Jeffrey White, Product Manager, IT Team, at Mountain America Credit Union



MOUNTAIN AMERICA

Mountain America Credit Union offers a full suite of financial services to over 100 branches throughout the Midwest. As an organization, they strive to build strong relationships with their members and ultimately guide them toward financial stability and success. Mountain America has more than 100 branch locations in six states (Utah, Nevada, Arizona, Idaho, New Mexico and Montana) across the Intermountain West. Mountain America currently has over one million members and is growing rapidly.



The Challenge

Integrating Disparate Systems

Like many credit unions today, Mountain America focuses on building engagement with their members. They needed deeper insight into member interactions but were limited due to disparate systems.

Mountain America had tried other CRM systems, but user adoption was low because it didn't integrate with critical frontline employee tools, making it difficult to achieve customer satisfaction goals and make connections with members.

The Solution

Microsoft Dynamics 365 Customer Service

Mountain America found a great Partner in JourneyTEAM to help design and establish a unique omnichannel user experience where users could easily access all customer data when needed.



The Goals

Goal #1: 360-Degree View of Customer Interactions

As a financial partner, much of the relationship that Mountain America has with their members' hinges on positive and efficient interactions. Their member service teams saw the need for increased organization and insight into the history of client calls, chats and emails.

Mountain America needed a single place where they could track and sort these member interactions, and thereby resolve member needs and answer questions quickly.

Goal #2: Streamline Onboarding Process for New Members

To support lasting relationships, Mountain America also wanted to ensure their new members have a good experience, are looked after and satisfied with their products. When a new member is onboarded, Mountain America wanted to provide proactive engagement and follow-up to help them on their new member journey and proactively address their financial needs.

Goal #3: Tracking Data to Improve Business Decisions

To stay competitive, Mountain America needed to analyze phone call activity with members to improve and streamline the incoming call process. They wanted to decrease their call wait times by sending members to the right agent more quickly. Generally speaking, Mountain America needed to improve call efficiency, internal transfers and wrap-up time, but did not know how to gather and leverage incoming call data. Mountain America needed a more powerful tool to aid in call transfers and improve call wait and response times.



The Outcomes

By implementing Microsoft Dynamics 365 Customer Service, Mountain America Credit Union is now able to leverage one tool to connect their member data with a future goal to one day manage all members' transactional needs.

Improved Customer and User Experience: JourneyTEAM integrated Dynamics 365 and wrote a C# plugin to pull data from a Mountain America written API when opening the member's account record in D365 to pull up their historical data quickly. Any interactions with a specific member are logged, and are easily accessible so the employee knows how best to help the member in the moment. Security roles, flows and automated processes were implemented to save time and effort for the Mountain America agent/user.

Real-Time and Nightly Migration of New Customer Data: JourneyTEAM and Mountain America developers integrated their CORE with Dynamics 365 to update its new member data in real-time using the plugin mentioned above. This process is fast and limits errors. Nightly data jobs were also created to update member information at least once per day. These connected systems can also track any new member activity or comments in one location. When a new member is added to the system, an agent is automatically assigned a checklist of tasks so the new member's information is fully captured and integrated properly.

Omnichannel Views that Show Results and Predict Improvements: An omnichannel member experience was implemented to handle incoming phone calls, chats, and in the future, text messages. All of Mountain America Credit Union's users and services can be seen in their CRM, and interactions are easily directed to the corresponding Mountain America agent. Supervisors can use dashboards to see how their agents are doing, how many phone calls, chats or text message activities are happening, and can join in-progress activities to actively assist the agent. Individual branches can also use this implementation to log concerns/feedback from members, and thereby help Mountain America's service center improve their processes and enhance member service communications.



The Results



Unified System



Real-time Customer Data



Omnichannel Member Experience



Improved Data Visualization


The Next Steps

STEP 1




Contact
JourneyTEAM
Experts

STEP 2



Get end-to-end
guidance

STEP 3



Enjoy efficiency,
scalability,
security, and so
much more

CONTACT NOW

Why JourneyTEAM

JourneyTEAM is an award-winning, Gold-Certified Microsoft Partner that specializes in all three Microsoft Clouds: Modern Workplace, Microsoft Azure, and Microsoft Business Applications, including Microsoft Dynamics 365 and Power Platform.

JourneyTEAM is dedicated to helping customers achieve a competitive advantage by identifying the best solutions and services that accommodate their business needs. JourneyTEAM provides consultation, training, and implementation in the United States, developing and deploying connected business technology solutions that help leading global companies across several industries, including Finance, Manufacturing, Media & Communications, and Healthcare, get to market faster and achieve continued success.

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"Through our relentless pursuit of excellence, we simplify and effectively use technology to create a positive, lasting impact on the world."

—JourneyTEAM Vision Statement