



Credit Union Communications Checklist

Ensure both flexibility and compliance while taking care of members

A FULLY INTEGRATED CLOUD COMMUNICATIONS PLATFORM EMPOWERS YOUR EMPLOYEES TO SERVE MEMBERS FROM WHEREVER, WHILE ALSO SUPPORTING YOUR COMPLIANCE AND SECURITY NEEDS:

- Help customers help themselves with basic tasks – such as checking account balances – freeing member service agents to spend time on more-complex needs.
- Members see your business phone number whether your employees are connecting with them from home, via mobile phone, or from the office.
- Your service reps can get real-time customer insights for quick context, helping them deliver more – informed responses that shorten resolution times.
- Manage audits more effectively when member insights for quick context, helping them deliver more-informed responses that shorten resolution times.



ONE COMMUNICATIONS PLATFORM - ONE LOW MONTHLY RATE
PHONE | PHONE | MEET | CHAT | COLLABORATE | ENGAGE

COMMON ISSUES FACING CREDIT UNIONS

- Members expect speed and convenience in every interaction. Your communications technology needs to empower service reps to deliver quick, high-value member service through any channel, every time.
- Pandemic-driven hybrid work models require communications systems that support employees working from wherever.
- Credit unions are subject to regular audits to ensure proper compliance and risk management.
- Legacy phone systems are expensive to maintain, making cost-effective cloud communication systems more appealing.

WE HAVE THE EXPERTISE, EXPERIENCE, AND COMMUNICATIONS PLATFORM TO HELP YOUR CREDIT UNION THRIVE IN THIS NEW ENVIRONMENT.

	YOUR NEEDS	OUR SOLUTIONS
DELIVER SUPERIOR MEMBER EXPERIENCE	<ul style="list-style-type: none"> <input type="checkbox"/> Communicate seamlessly through member-centric channels. <input type="checkbox"/> Meet member needs quickly with the right resources or service rep. <input type="checkbox"/> Accommodate members who are digitally native and expect more. <input type="checkbox"/> Make sure members don't have to repeat themselves each time they contact you about a single issue. <input type="checkbox"/> Extend reach and facilitate faster response times for member inquiries. 	<ul style="list-style-type: none"> ✓ Elevate integrates voice, chat, and video conferencing interactions on one platform. ✓ With Contact Center, you can easily customize call flow to assign the right agent at the right time, and QA features deliver exceptional results. ✓ Turn your member service capability into an outreach powerhouse with dynamic notifications. ✓ Contact Center's real-time insights get service reps into context quickly, helping them to deliver more-informed responses that shorten times to resolution. Plus, deep historical reporting helps improve future interactions. ✓ Contact Center's dynamic notifications proactively send reminders while respecting members' preferences.
MOBILITY AND FLEXIBILITY	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure employees can be productive whether they work at home, in the office, while commuting, or from some mix of locations. <input type="checkbox"/> Give members a seamless and consistent communications experience across channels and over time. <input type="checkbox"/> Allow video conferencing participants to join meetings from any location. <input type="checkbox"/> Ensure members receive a consistent experience. <input type="checkbox"/> Accommodate distributed service rep teams and multiple branch locations. 	<ul style="list-style-type: none"> ✓ As a tightly integrated platform, Elevate ensures consistent communications regardless of where your employees are. ✓ Chat and SMS automatically synchronize across mobile and desktop apps, and real-time member insights speed response time. ✓ Elevate lets meeting participants join from mobile phones, desktops, and laptops. ✓ Voice, chat, and email queues combine into a single omni-channel experience. ✓ Enable anytime, anywhere communications from any device.

	YOUR NEEDS	OUR SOLUTIONS
SECURE CLIENT COMMUNICATIONS AND INDUSTRY COMPLIANCE	<ul style="list-style-type: none"> <input type="checkbox"/> Manage risk by ensuring cloud service providers are independently audited. <input type="checkbox"/> Protect or encrypt confidential client correspondence, files, text messages, voicemails, and email. <input type="checkbox"/> Share documents securely. <input type="checkbox"/> Choose cloud service providers with high uptime SLAs. <input type="checkbox"/> Ease the audit process with configurable file retention policies, long-term storage, and by enabling access to archives by specific roles. <input type="checkbox"/> Avoid use of and protect disclosure of employee mobile phone numbers. <input type="checkbox"/> Have confidence that your cloud services providers take security measures that facilitate regulatory compliance Choose cloud service providers with high uptime SLAs. <input type="checkbox"/> Protect your business files against malware, viruses, and cyber crime. 	<ul style="list-style-type: none"> ✓ Our solution is SOC 2 audited, which attests to our high security standards – for our products, networks, infrastructure, and privacy protection. ✓ Emails, files, video conference recordings, and more can be secured at rest and while in transit. ✓ Account-level encryption keys secure stored documents, and SSL/TLS secures documents as you share them. ✓ Our cloud is purpose-built for 99.999% uptime with a financially backed SLA. ✓ Elevate offers secure, low-cost, and long-term storage with support for and indexing of relevant data types and formats and role-based permissions for accessing archives ✓ Callers see your business phone number, whether employees are engaging from their mobile phones, desktop phones, or a remote service location. ✓ Our solution is independently audited and offers security protection across seven pillars. ✓ Elevate quarantines infected files and integrates Bitdefender anti-malware capability.
PUT AN END TO LEGACY PHONE SYSTEM COSTS	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure cost efficient communications and collaboration without sacrificing quality or features. <input type="checkbox"/> Easier configuration and deployment. <input type="checkbox"/> Supplement desk phones with other communication channels. <input type="checkbox"/> Ensure business continuity. 	<ul style="list-style-type: none"> ✓ Elevate offers 90+ enterprise-grade calling features and excellent network call quality and uptime. ✓ Savings of up to 50% on monthly phone bills compared with traditional phone services. ✓ Flat, per-user rates with no annual contracts, no hidden fees, and no hardware to buy, manage install, or replace. ✓ A single web-based portal lets you configure the system and manage call reporting. ✓ Elevate tightly integrates desk phones, mobile phones, chat, SMS, video conferencing, screen sharing, file sharing, and file backup to facilitate increased collaboration and productivity. ✓ Elevate automatically rings all your end points in the event you don't answer, and routes calls to any number you choose.

Contact us today to find out how a fully integrated cloud communications platform can help your credit union thrive and grow.