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 members 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 agents can get real-time member insights for quick context, helping them deliver more-informed responses and service that can shorten resolution times.	Manage audits more effectively when your cloud services provider has security and privacy controls that address FINRA, GDPR, SOC 2, Sarbanes-Oxley, and more.

COMMON ISSUES FACING CREDIT UNIONS

> Members expect speed and convenience in every interaction. Your communications technology needs to empower service representatives to deliver quick, high-value member interactions and experiences through any channel (i.e., voice, email, SMS)

> Credit unions are subject to regular audits – ensure proper compliance and risk management, with security and privacy controls

> Legacy phone systems are expensive to maintain, making low-cost, subscription-model cloud communication systems (with enhanced capabilities) more appealing

> Pandemic-driven hybrid work models require communications systems that support employees working from wherever

> Branch and workforce requirements often change. Credit unions require a communications system that provides easy access to scale up or down for changes to locations and users

We have the expertise, experience, and communications platform to help your credit union thrive in this new environment.

UNIVERGE BLUE CLOUD SERVICES
CREDIT UNION COMMUNICATIONS CHECKLIST

YOUR NEEDS	UNIVERGE BLUE CLOUD SERVICES
DELIVER SUPERIOR MEMBER EXPERIENCES	
☐ Communicate seamlessly through member-centric channels.	✔ UNIVERGE BLUE CONNECT integrates voice, chat, and video conferencing interactions on one platform.
☐ Meet member needs quickly with the right resources or service representative.	✔ With UNIVERGE BLUE ENGAGE Contact Center, you can easily customize call flow to assign the right agent at the right time, and QA features deliver exceptional results.
☐ Accommodate members who are digitally native and expect more.	✔ Turn your member service capability into an outreach powerhouse with dynamic notifications.
☐ Make sure members don't have to repeat themselves each time they contact you about a single issue.	✔ Real-time insights from ENGAGE Contact Center helps to get service representatives into context quickly, so they can deliver more-informed responses that shorten times to resolution. Plus, deep historical reporting helps to improve future interactions.
☐ Extend reach and facilitate faster response times for member inquiries.	✔ ENGAGE's dynamic notifications proactively send reminders while respecting members' preferences.
SUPPORT MOBILITY AND FLEXIBILITY	
☐ Ensure employees can be productive whether they work at home, in the office, while commuting, or from some mix of locations.	✔ As a tightly integrated Unified Communication platform, UNIVERGE BLUE CONNECT ensures consistent communications regardless of where your employees are.
☐ Give members a seamless and consistent communications experience across all channels and over time.	✔ Voice, chat, and email queues combine into a single omni-channel experience for your agents to provide consistent, seamless service to your members. Chat and SMS automatically synchronize across mobile and desktop apps. Real-time member insights speed response times.
☐ Allow video conferencing participants to join meetings from any location.	✔ CONNECT lets meeting participants join from mobile phones, desktops, and laptops.
☐ Accommodate distributed service representative teams and multiple branch locations.	✔ Enable anytime, anywhere communications from any device.
SECURE MEMBER COMMUNICATIONS AND INDUSTRY COMPLIANCE	
☐ Manage risk by ensuring cloud service providers are independently audited.	✔ UNIVERGE BLUE CLOUD SERVICES are SOC 2 audited, which attests to our high security standards – for our products, networks, infrastructure, and privacy protection.
☐ Protect or encrypt confidential client correspondence, files, text messages, voicemails, and email.	✔ Emails, files, video conference recordings, and more can be secured at rest and while in transit.
☐ Share documents securely.	✔ Account-level encryption keys secure stored documents, and SSL/TLS secures documents as you share them.
☐ Choose cloud service providers with high uptime SLAs.	✔ Our cloud is purpose-built for 99.999% uptime with a financially backed SLA.

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YOUR NEEDS	UNIVERGE BLUE CLOUD SERVICES
SECURE MEMBER COMMUNICATIONS AND INDUSTRY COMPLIANCE	
☐ Avoid use of and protect disclosure of employee mobile phone numbers.	✔ Callers see your business phone number, whether employees are using their mobile phones, desktop phones, or a remote service location.
☐ Have confidence that your cloud services provider takes security measures that facilitate regulatory compliance.	✔ NEC is independently audited and our cloud solutions offer security protection across seven pillars.
☐ Protect your business files against malware, viruses, and cybercrime.	✔ CONNECT quarantines infected files and integrates Bitdefender anti-malware capability.
PUT AN END TO LEGACY PHONE SYSTEM COSTS	
☐ Ensure cost-efficient communications and collaboration without sacrificing quality or features.	✔ UNIVERGE BLUE CONNECT offers 100+ 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.
☐ Easily configure and deploy communication systems.	✔ A single web-based portal lets you configure the system and manage call reporting.
☐ Supplement desk phones with other communication channels.	✔ CONNECT tightly integrates desk phones, mobile phones, chat, SMS, video conferencing, screen sharing, file sharing, and file backup, to facilitate increased collaboration and productivity.
☐ Ensure business continuity.	✔ CONNECT 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.