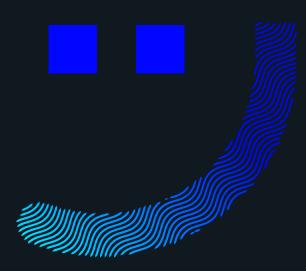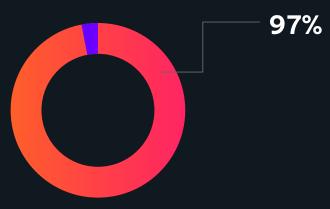# PSCU Builds on Previous EEM Success to Automate 71,000+ Transactions a Year

PSCU is the nation's largest credit union service organization (CUSO) and an integrated financial technology solutions provider. Founded more than 45 years ago, PSCU is a trusted partner to more than 2,400 financial institutions. The company had seen previous success in its initial implementation of NICE Employee Engagement Manager (EEM) to add intraday schedule changes and a robust set of employee self-service options to the contact center. The next chapter of EEM for PSCU aimed to reduce manual analysis and better target opportunities for Voluntary Time Off (VTO) and Overtime (OT).

**97% PARTICIPATION RATE WITHIN SIX MONTHS**

97%

**71,000 + ANNUAL TRANSACTIONS PROCESSED AUTOMATICALLY**

**75% DECREASE IN MONTHLY ABSENTEEISM RATES**

75%

**1 FTE SAVINGS IN REAL-TIME STAFF**

**IMPROVED EMPLOYEE SATISFACTION**

## CUSTOMER PROFILE

| | |
|---|---|
| ABOUT | Founded by credit unions more than 45 years ago, PSCU enables credit unions to meet evolving consumer demands and provide personalized, connected experiences for their members. Committed to service excellence and focused on continuous innovation, PSCU provides an end-to-end portfolio of solutions—from payments processing and fraud mitigation to digital banking and contact center support that serves as an extension of credit union staff—to help credit unions grow. |
| INDUSTRY | Financial Services |
| WEBSITE | www.pscu.com |
| LOCATION | Headquartered in St. Petersburg, FL |
| AGENTS | 600 + agents |
| GOALS | • Proactively manage VTO and OT<br>• Reduce absenteeism and attrition<br>• Increase self-service hours<br>• Boost employee engagement |
| PRODUCTS | • NICE Employee Engagement Manager |
| FEATURES | • Mobile app schedule access<br>• Automated intraday analysis<br>• Schedule change control |

# Case Study



## 01 THE BEFORE

### A successful EEM implementation and improved self-service

PSCU's initial deployment of EEM made several positive changes for the entire team. Upwards of 85% of all self-service schedule change requests were now automatically approved, greatly reducing the manual workload for both agents and managers. Shift trades were becoming a popular choice after being mostly overlooked as an option before. Adoption rates of the new platform were strong overall, helped along by a focus on training and removing access to alternate methods in the main web platform.

## 02 DESIRE TO CHANGE

### Looking ahead to continuous improvement

With EEM now fully onboard, PSCU's focus turned to what the next chapter could look like. The company wanted to explore how EEM could reduce attrition numbers as well as how additional notifications and alerts could enhance the agent experience. "We wanted to improve our employee engagement, reduce manual analysis, and get more proactive in offering our agents VTO and OT opportunities," Vogel said.

While EEM had already solved some of the challenges of schedule changes, PSCU real time agents were still manually addressing many of the requests, including adjustments to breaks, start of shift, and end of shift based on the adjusted schedule. Some requests resulted in multiple emails back and forth between supervisors and agents to finalize requests. This made approving VTO and OT time consuming and difficult, and PSCU struggled to consistently offer these opportunities. Training materials also began to feel out of date as new features were considered.

## 03 THE SOLUTION

### New features, better training, and a near 100% participation rate

To test additional features and benefits of EEM, PSCU utilized the help desk agents as a pilot group. At just 60 agents, the help desk team is smaller than other groups and a great fit for initial implementation. These agents were given access to additional self-service tools for scheduling, VTO, and OT. Each agent was assigned a time to review training materials, which were built from documentation PSCU had created previously, along with informational videos from NICE. Within the first month of roll out, 90% of the help desk team was enrolled and actively using EEM.

PSCU continued momentum by leveraging the learnings from this pilot group. Training materials were revamped to better explain the steps for each type of request in both the web and app formats. Supervisor training materials were also updated to enable better support for the agents. "These changes in the learning materials were a large part of the success we had in limiting issues and questions previously seen in the pilot and ensuring the adoption of EEM by the larger population," Vogel said. All learning materials were integrated into new hire classes to help acclimate employees before they joined the floor.

The updates to EEM largely centered on giving agents more control of their schedule and included removing limits on the number of schedule swaps agents are allowed per quarter; shift trades between agents; and real time notifications about available VTO and OT. These options had been restricted before due to the amount of time supervisors would need to coordinate and approve the requests manually. Adoption by the broader team of 600 agents was highly successful; within six months, PSCU had a 97% participation rate, beating their goal of 80%.
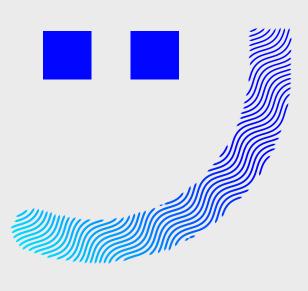
## 04 THE RESULTS

### Tens of thousands of interactions automated, hundreds of hours saved

After implementation, self-service hours on the team grew nearly five times what they were prior to EEM. In 2022, EEM applied 110,632 self-service hours to agent schedules, and processed 84,746 transactions. 71,658 of those transactions were automatically approved, producing an 85% auto completion rate. This has resulted in massive time savings for both agents and supervisors, eliminating the need for most back-and-forth discussions to approve schedule requests. "85,000 touches at a few minutes per touch adds up to considerable time savings," Vogel said.

PSCU also reached the goal of improving targeting for VTO and OT opportunities. "EEM allows us to break our needs down to the interval level and use different methods to determine our staffing needs," Vogel said. Staffing levels

**NICE**

and forecasts can be more easily compared in EEM and can supplement VTO and OT needs with shift trades and shift swaps. The platform takes multiple factors into consideration and presents the needs to agents based on areas they are skilled to support. The EEM process starts as soon as schedules are released, around three weeks out, and PSCU has mostly eliminated same-day needs.

Vogel said that the more accurate scheduling EEM provides has boosted employee satisfaction and reduced absenteeism monthly by about 75%. PSCU has also been able to reduce Real Time Analyst coverage on the weekends and reduce Workforce Management hours of operation while still providing the same, and in some cases better, support overall. "That is all a benefit of the automation," Vogel said. He praises EEM's quick schedule adjustments for leading to "some of the lowest attrition rates that PSCU has seen recently, as agents can change their schedules to avoid accruing attendance issues that could result in termination."

Additionally, the lack of flexibility to make schedule adjustments while away from of work had been a concern on employee surveys.  Now that agents can see their schedules; submit and receive almost immediate confirmation on time off requests; schedule trades and swaps; and sign up for VTO or OT both at work and from their phones, PSCU has also seen a favorable response in their employee engagement surveys. The company won a 2023 Gallup Exceptional Workplace Award - one of only 57 companies globally to receive the award - and was named to Forbes' 2023 list of America's Best Midsize Employers.

## 05 THE FUTURE

### Moving management from data entry to analysis

With two successful deployments of EEM for their agents, Vogel said PSCU is now looking at how to utilize the tool for managers and supervisors. They plan to add Real-Time Alerting at the start of the new fiscal year, aiming to help managers monitor certain aspects of processes and workflows that currently lack visibility. Vogel said, "With additional upgrades, we want to remove the majority of administrative work from their plates so they can focus on what matters."

> "EEM allows us to break our needs down to the interval level and use different methods to determine our staffing needs."

BRIAN VOGEL
WORKFORCE MANAGER
PSCU

## About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

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