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Progressive Maryland Credit Union Implements State-of-the-art Communications Platform from Interactive Intelligence & Adapt Telephony Services

“The Adapt team is very professional. They got everything up and running, tested, and operational on schedule. Whenever we have had questions about usage, technical issues, or software upgrades, Adapt has provided excellent support.”

Tim Daugherty, Project Manager at NIHFCU

The National Institutes of Health Federal Credit Union (NIHFCU) is a progressive \$350+ million credit union headquartered in Rockville, Maryland. Because of their excellent member service and complete line of products and services such as consumer loans, credit cards, mortgage/home equity loans, secured interest-bearing savings, checking and investment accounts, NIHFCU has grown to become one of the largest credit unions in Maryland. So it is no wonder that they have installed a state-of-the-art communications infrastructure between their headquarters and ten branch network. Their choice for a systems integrator: Adapt Telephony Services, LLC, a full-service computer telephony integrator that resells, installs, custom configures, and provides support for the Interaction Center® software suite from Interactive Intelligence.

NIHFCU began their search to upgrade their traditional PBX (Private Branch eXchange) telephone system back in 2004. An in-depth RFP (request for proposal) was developed by a team of senior managers at the credit union and was submitted to four top vendors. After demonstrations and much due diligence, the credit union decided that only the Interactive Intelligence system offered all of the functionality that they were looking for at an affordable price point. Chicago-based Adapt, who is a Master Integrator and Preferred Partner for Interactive Intelligence, was the chosen partner. Tim Daugherty, Project Manager at NIHFCU, was tasked with working as a vendor liaison with Adapt and making sure that the implementation went smoothly. Tim recalls that “we worked together to go over the scope of work and review the project plan from start to finish. Not only is the Adapt team extremely knowledgeable about their system, but also about working with telecom carriers and telecommunications in general.”

To complicate matters, NIHFCU was not only installing a new communications platform, but also moving their headquarters at the same time. Daugherty was pleased to discover that not only were Adapt’s project managers very helpful, but that their installation team was also “very professional. That got everything up and running, tested, and operational on schedule.” They also installed a backup server that included an auto-

Credit Union:

National Institutes of Health FCU



Solution:

Computer Telephony System

Benefits:

- ❖ **Powerful telecomm system that is also easy to administer**
- ❖ **User friendly for employees and integrates with Outlook**
- ❖ **Professional and knowledgeable installation and support**



switchover feature which provides for virtually no down time, as well as a great deal of peace of mind for the credit union's employees who depend on reliable voice communications. Plus, NIHFCU's IT Department discovered that the new system was easy to administer and support since it is a completely Windows-based 'point and click' environment.

As for NIHFCU's rank and file employees, they – like employees in any organization – were somewhat nervous about any technology changes. Daugherty recalls that “it took a little while for our staff to get used to using their computers for dialing, but once they understood how it easy and powerful the new system was, they really embraced it.” Training went smoothly and the employees quickly realized the benefits of the new system: easy call transfers, quick setup of conference calls, integration with Microsoft Outlook and much more. Daugherty notes that “our senior managers were really happy with the new system and all of our employees just love it because it is so user friendly.”

After the headquarters went live and all ten branches were installed, the credit union could gradually add more functionality. The Interactive Intelligence suite includes a complete array of communications applications that replace a wide range of legacy devices, including PBX, Interactive Voice Response (IVR), Automatic Call Distribution (ACD), fax servers, voice mail systems, and Computer Telephony Integration (CTI) gateways. For example, NIHFCU has put in place a survey application which gathers member feedback after calls to their contact center, and they are looking to add online Web chat from their website. Daugherty states that “whenever we have had questions about usage, technical issues, or software upgrades, Adapt has provided excellent support.” He concludes that “overall, the whole transition went very smoothly. We recommend working with Adapt because they are very professional and knowledgeable.” *t-t*

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