

# case study



## Boeing Employees Credit Union Customer Care with Confidence

*Boeing Employees' Credit Union (BECU) started using DocuWare in its Member Care department to improve member service by processing faxed requests in a more efficient and streamlined manner.*

BECU was founded in Seattle, Washington, in 1935, by 18 Boeing employees as a credit union to help themselves and other Boeing employees. Today, BECU now serves all residents in the State of Washington. With over 547,000 members and assets in excess of \$8.4 billion, BECU employs approximately 900 people and operates 45 branch locations in western Washington. BECU has grown and changed with the times, but they have always remained true to their original founders' philosophy of people helping people and their not-for-profit status, ensuring all members get the best value for their membership.

### Documents

The Member Care department handles numerous types of documents including consumer loan contracts for vehicles and homes, new membership accounts, wire transfers and basic correspondence received directly from their members or front line staff.

### Work Process

The majority of the documents collected at BECU's various branch locations are sent to the Member Care department for processing. These documents are received by fax, which is how most of their paper is generated. The volume and multiple touching of paper required significant time and resources.

At the end of each day, paper documents in progress are locked in a room and stored overnight. The next day, these documents are redistributed to the appropriate staff member to complete processing.

Although this is a simple task, it is redundant and time consuming due to the amount of paper involved. As soon as paper documents are completely processed, they're sent to the records department to be scanned for long term storage. The originals are then shredded.

The Contact Center frequently receives calls from members requesting confirmation that a faxed document has been received. This requires a call to the Member Care department to manually sort through the faxes to provide this confirmation.

### Solution Requirements

BECU needed a solution that would streamline the everyday workflow coming in from its members and branch locations via fax, while eliminating or significantly reducing the amount of paper. While most documents needed access by everyone, some required limited access, so the solution also needed to provide visibility of received documents.

### Solution

By implementing DocuWare and Right-Fax software, BECU now receives and processes incoming faxes electronically. Faxes are automatically imported into DocuWare where a Member Care Specialist reviews and assigns them to an employee for processing. This is done using DocuWare's CONTENT-FOLDER module which electronically routes work between employees.

Through SQL scripts, manual indexing is minimized. Now when a document is sorted for processing and a corresponding member number is applied to it, members' first name, last name and other identifiers are automatically pulled from their external database. Filing and retrieval time has been

drastically reduced, especially when it comes to inquiries. Even if a newly received document hasn't begun processing, the Contact Center is able to access the necessary information over the internet via DocuWare's INTERNET-SERVER module. "DocuWare has helped us increase our service levels," stated Shane Morris, a Member Care Specialist. "Now that the Contact Center can access important document information, inquiries into the Member Care department have dropped off significantly, allowing staff to focus more on member-oriented duties."

### Benefits in Detail

#### User Benefits

Employees are now able to complete daily tasks in a more efficient manner. Incoming calls are handled expediently now that information can be found at their desktop within DocuWare.

#### Department Benefits

The Member Care department is able to efficiently process the increase in documents, with the same staff. The department can actively focus on its production duties, as well as its first priority which includes providing excellent service to their members and internal customers. The goal of streamlining work in a more efficient manner has been achieved. "We're pleased with the efficiencies and operational improvements that the DocuWare solution has provided," stated Debra Gipe, Member Care Manager.

#### Corporate Benefits

Now that BECU's Contact Center and Member Care department have immediate access to documentation, their mission statement, "BECU members always experience the best value and service with complete trust," continues to follow their people helping people roots.



*"We're pleased with the efficiencies and operational improvements that the DocuWare solution has provided."*

*Debra Gipe,  
Member Care Manager,  
BECU*

### The Task

- Quickly and easily process incoming faxes
- Automate work processes
- Reduce document handling time
- Reduce Contact Center inquiries

### Appointed Modules

- ACTIVE IMPORT
- CONTENT-FOLDER
- INTERNET-SERVER

### The Benefits

- Efficiently process documents without adding personnel
- Customer service levels have been surpassed
- Contact Center now able to handle customer inquiries at the point of contact