

TANDBERG CUSTOMER PROFILE

Visions
Federal Credit Union



“We were born as part of a technology company, and now TANDBERG technology is helping us grow and serve our membership better.”

DON BERNARDO,
SENIOR TRUST OFFICER

With TANDBERG, Visions Federal Credit Union Increases Employee Satisfaction, and Offers a Higher Caliber of Services to Members

Committed to managing internal growth while also providing their growing membership with superior services and educational opportunities, Visions Federal Credit Union turned to TANDBERG. The result: a cost-effective visual communication solution that brings dispersed staff together, improves morale and productivity, and provides specialized financial consultation to members in real time.

The Challenge

“Visions Federal Credit Union has grown rapidly in the past five years,” says Lori Kemmerer, Assistant Vice President and Chief Member Services Officer. “In addition to new offices that are geographically dispersed, we’ve also introduced a lot of new products, programs, policies, and procedures. As we began to spread out over a wider geographic area, our regular weekly meetings and an increasing array of other meeting requirements caused increasing travel time & expense, slower implementation of new policies, products and programs, and lowered productivity. We needed a better way.”

Headquartered in Endwell, NY, Visions Federal Credit Union (VFCU) has assets of over \$1.6 billion, and serves their expanding customer base through 22 branch offices and 80 ATMs located throughout upstate New York and Northern Pennsylvania. Operating as a not-for-profit financial institution, Visions is completely owned by its members, and organized for the economic benefit and assistance of its constituents.

“Our board members completely support implementing a visual communication solution to connect our offices. I knew it would be enormously useful in my own position – as trust officer I serve 22 branches spread across a hundred mile radius. Because my services are higher level and a little off the beaten track for the typical credit union, I need to train branch office staff to keep them current on a weekly basis. I knew a visual communication solution could save me hours of driving from branch to branch. With the right technology, I could train rooms full of people, even interact with clients or prospective clients, without ever leaving my office”, says Don Bernardo, Senior Trust Officer.

In addition to improving the employee morale, efficiency and work-life balance of their staff, Visions is also very committed to educating their members on an ongoing basis, their pro-active educational seminar program is a cornerstone of their value-add services to members. “It is part of our mission as a non-profit,” notes Kemmerer. “We’d scheduled more than 260 seminars in our branches on a

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Visions Federal Credit Union Uses

TANDBERG for:

- Regular training meetings for personnel at branch offices
- Long-distance conferences between credit union members and expert staff advisors
- Educational training sessions & presentations at branch facilities to share expertise and knowledge with credit union members
- Administrative meetings between branches, reducing travel times and expenses

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wide range of topics, from how to build credit or balance a checkbook to how to buy your first home or start a trust account. Unfortunately, the cost of staffing all of these classes – of bringing qualified trainers to distant branches – started reaching a point where something had to give. We thought videoconferencing might be the answer."

The Solution

"It didn't take us long to find TANDBERG," says Tom Hull, Chief Information Officer. "Their solution was recommended by both our integration partner and by CISCO, the people who provided our data network. That made TANDBERG the logical choice."

Today, Visions FCU is visually enabled with TANDBERG video systems, from branch offices and training rooms to the CEO's desk. The video systems operate via the Cisco Call Manager for seamless integration of their video and audio calls.

The Results

Visions' staff has seen a significant improvement in efficiency – improved morale and faster product and program implementation have had the biggest impact on their business operations and customer service delivery at the credit union.

"Thanks to TANDBERG, staff members can participate in all of our meetings and training classes without having to travel," says Kemmerer. "Productivity has gone up primarily because people can implement what they've learned immediately. Not having to travel for hours in each direction for meetings allows our staff to walk into their workday fresh, ready to act on what they've just learned. With videoconferencing, everyone can attend – no one has to stay behind to open the branch for members. Plus, we can do more in far less time."

The TANDBERG solution has improved communications both among the staff and between members and staff. Having visual communications among branch employees has created a more cohesive team across all the Visions FCU branches, even as the credit union expands. "In addition, our members like the level of access TANDBERG gives them," Kemmerer points out. "They can speak face-to-face with executive staff and banking experts directly, without having to travel 60 miles out of their way, or waiting a week to get an appointment."

Visions FCU has also been able to expand their exceptional educational programs for their members. Instead of having management team or trainers drive hours to do these conferences, they teach them remotely, without leaving their home offices. Trainers stay more productive, more members can be reached with each educational seminar, and costs have been dramatically reduced.

Looking forward, Visions is considering expanding the use of TANDBERG visual communication to provide expanded real time advice to members. Self-serve kiosks could be one solution, offering a pre-recorded selection of educational presentations, with a direct link to a live staff member or specialist at any time. In addition, Visions FCU sees the value in using their TANDBERG solution to handle emergencies, such as natural disasters or robberies. "Imagine how helpful it could be to have face-to-face contact with another branch during a time of crisis, notes Hull. "It could help our staff stay calm and take appropriate action immediately, safeguarding them and our members' interests."

"Today, choosing TANDBERG technology seems a very natural part of our continued success, helping us grow and serve our membership better", says Bernardo.