

RESULTS:

50%

of all IT tickets are created independently by employees.

30 hours

saved each week on administration, routine phone calls, follow-ups, manual ticket creation, and triaging.

4.8 out of 5

in employee satisfaction scores thanks to faster, more efficient IT service, support and issue resolution.



THE CHALLENGE:

1. Ticketing was manual and time-consuming, creating a lot of pressure on the IT team.
2. The service management system was cumbersome and had no way to share the status of open tickets.
3. The company embarked on a strategy to become more digitally friendly across the organization and more employee-centric in-house.

THE SYSAID APPROACH:

1. SysAid's Workflow Designer made it easy for IT to meet dynamic needs, with codeless customization, automations, and drag-and-drop visual flowcharts supporting workflows.
2. Automation capabilities orchestrate workflows across as many as 10 different departments, with custom routing, escalation, due date reminders, and more.
3. SysAid's enterprise service management (ESM) capabilities were adapted to support the Contact Center, the Digital Experience department and Business Analytics; Marketing and Compliance is next.



"SysAid enables us to go above and beyond in supporting our Team Members - and we've only just gotten started."

Joshua Tolliver, IT Service Delivery Manager, Centra Credit Union

Credit Where Credit Is Due at a Major US Financial Co-Op

Using SysAid, Centra Credit Union turns IT service into a source of delight for employees and Team Members allowing them to quickly resolve their own issues or easily open tickets themselves with SysAid's Self-Service Portal and workflow automation – improving efficiency, productivity, and service quality.



ABOUT CENTRA CREDIT UNION

Centra Credit Union ("Centra"), headquartered in Columbus, Indiana, is a not-for-profit financial cooperative providing a wide array of financial services to its Membership. The organization handles over \$1.9 billion in assets for more than 184,279 private and corporate Members in Indiana, Kentucky, New York, and North Carolina.

More than 400 employees serve Centra Members in 24 locations. The IT department consists of three teams, employing 20 people, supporting all the core banking information system applications, the network infrastructure and service delivery. All the Service Delivery Team Members use SysAid, with two of them handling changes, updates, and configurations.

Time-Saving Efficiency for Everyone

The IT Service Delivery team at Centra uses SysAid for managing service and change requests, incidents, and account processing, as well as employee terminations, transfers, and leaves of absence. Centra also makes extensive use of SysAid's *Self-Service Portal*, with about 50% of all tickets created independently by company employees.

The cumulative result is a savings of about 30 hours per week over the previous ticketing system, as well as relief from a lot of pressure on Centra IT personnel. They no longer need to devote time and energy to routine phone calls, follow-up with users, manually creating tickets, or triaging support issues.

“My team doesn’t have to enter multiple tickets for the same issue or constantly follow up on those issues manually,” Joshua noted, “which is probably giving us another 10 hours per week.”

SELF-SERVICE

According to Joshua Tolliver, the IT Service Delivery Manager, the Self-Service Portal alone **“is saving my team at least 20 hours a week on the front end.”**

For Centra employees, the portal has provided both convenience and visibility. In the event of a problem, they need not wait for someone working the service desk to open a ticket. They can see the ticket’s status whenever they want and proactive email notifications keep them informed of progress toward resolution.

AUTOMATION

SysAid’s automated notification features bring Centra “another huge benefit,” as Joshua puts it, in orchestrating workflows for account processing and employee status changes. All the different stakeholders involved – from TME (Team Member Experience, HR) to Accounting to Facilities and as many as 10 different departments – are informed automatically when their approval or action is needed to move on to the next step.

Centra saves a lot of additional time on service delivery and streamlines ticket resolution with other SysAid automation capabilities. The IT team has established custom automatic routing and escalation rules, due date reminders, and the like, for optimal service desk management.

EMPLOYEE SATISFACTION

Centra employees have enjoyed faster, more efficient service and support, while the IT team has been freed to concentrate on issue resolution, rather than administrative and routine tasks.

Employees have expressed their appreciation in satisfaction surveys, with an increase in scores from 4.2 (out of 5) to 4.8 in the last few years. In addition to the surveys, which have a very good response rate, there are monthly follow-up meetings with branch locations and each line of business.

The collected feedback indicates Centra employees are **“very happy that we go out of our way to make sure things are actively being worked on, rather than building into a bigger problem,”** Joshua said.

USER-FRIENDLY SELF-SERVICE, DESIGN, AND IMPLEMENTATION

The previous ticketing system used by the IT department at Centra “wasn’t very customer- or end-user-friendly,” Joshua noted, “because it didn’t have a self-service portal and it was difficult to see the status of tickets that you had open.”

The adoption of SysAid was part of a larger strategy to make the cooperative more digitally friendly for Members and employees, as well as more employee-centric in-house. This holistic and engaging approach was strongly backed by Centra’s senior executives, providing critical support for the IT team as it navigated the transition.

The Marketing department took up the role of promoting the new system within the company with an excellent launch campaign.

In addition, an internal platform kept all Centra employees in constant communication at every level throughout implementation. “We used multiple avenues to let everybody know that something new was coming,” Joshua explained.

To coordinate all aspects of the various processes they intended to optimize, SysAid provided the Centra IT team with the user-friendly Workflow Designer. With codeless customization options, routine automations, and drag-and-drop visual flowcharts, Workflow Designer made it easy for Centra IT to tailor its operations to best meet dynamic organizational needs.

As a result of these efforts, adoption was rapid and widespread. Every employee is now well aware of the Self-Service Portal and uses it seamlessly on a day-to-day basis.

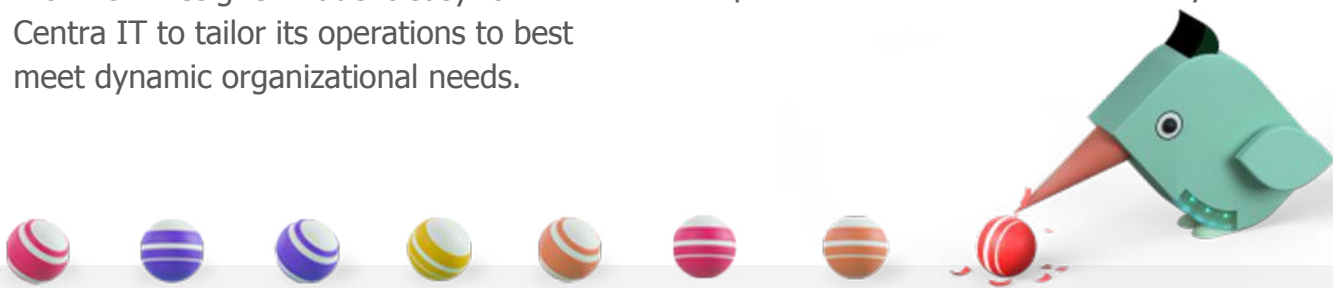
TRANSFORMATION BY WORD OF MOUTH

Other lines of business took a keen interest in the enterprise service management capabilities of SysAid after seeing its beneficial impact in IT. The first was the Business Analytics department, whose managers very quickly told the senior executive team how well SysAid was working for them.

That led to the newly established Digital Experience department working closely with the Centra Contact Center, getting on board as well. This was followed shortly by the Marketing department, which had asked specifically for a ticketing system. “As more and more people talk to each other here at Centra,” Joshua said, **“it seems like every few months we get a new request to help another line of business get in on using SysAid.”**

With the various departments using SysAid, separate areas were created in the system and the Self-Service Portal. Each department has independent access for assignment and management of its own tickets and requests, and employees using the Self-Service Portal can immediately find the department best suited to address their issue.

Joshua noted that, “after we get them up and rolling, we hardly ever hear from those other departments about an issue with SysAid.”



A FORWARD-LOOKING STRATEGY

The adoption of SysAid resulted in greater IT efficiency, speed, and accuracy, which has in turn improved productivity and service quality.

And that is just the start. As Joshua explained, **“Once I started digging into what SysAid has to offer, I felt like we have just touched the surface of what we can do with it.”**

Going forward, the IT department will be striving to improve productivity even further with more SysAid automation and notifications. They will also be considering how to better leverage SysAid’s reporting and analytics to ensure these improvements are actualized in increased SLA adherence.

Another SysAid feature Centra is planning to incorporate is the Knowledge Base, providing guidance to employees with the Self-Service Portal, as well as to those using SysAid on the back end. It will make it easy for employees to handle many common problems themselves, without having to wait for IT, while “all the technicians on my team will be able to quickly reach the information they need, whenever they need it,” Josh said.

Centra will also continue extending the scope of SysAid’s service management platform to include other departments. Next in line is the Compliance department, for which the internal approvals and training have already been completed.

