

First Tech Federal Credit Union:

Improving Member Experience Via MX Social Support Strategies

2017 CUNA Operations & Member Experience Council Awards: Misc. Category



Social Media Support Problem Statement:

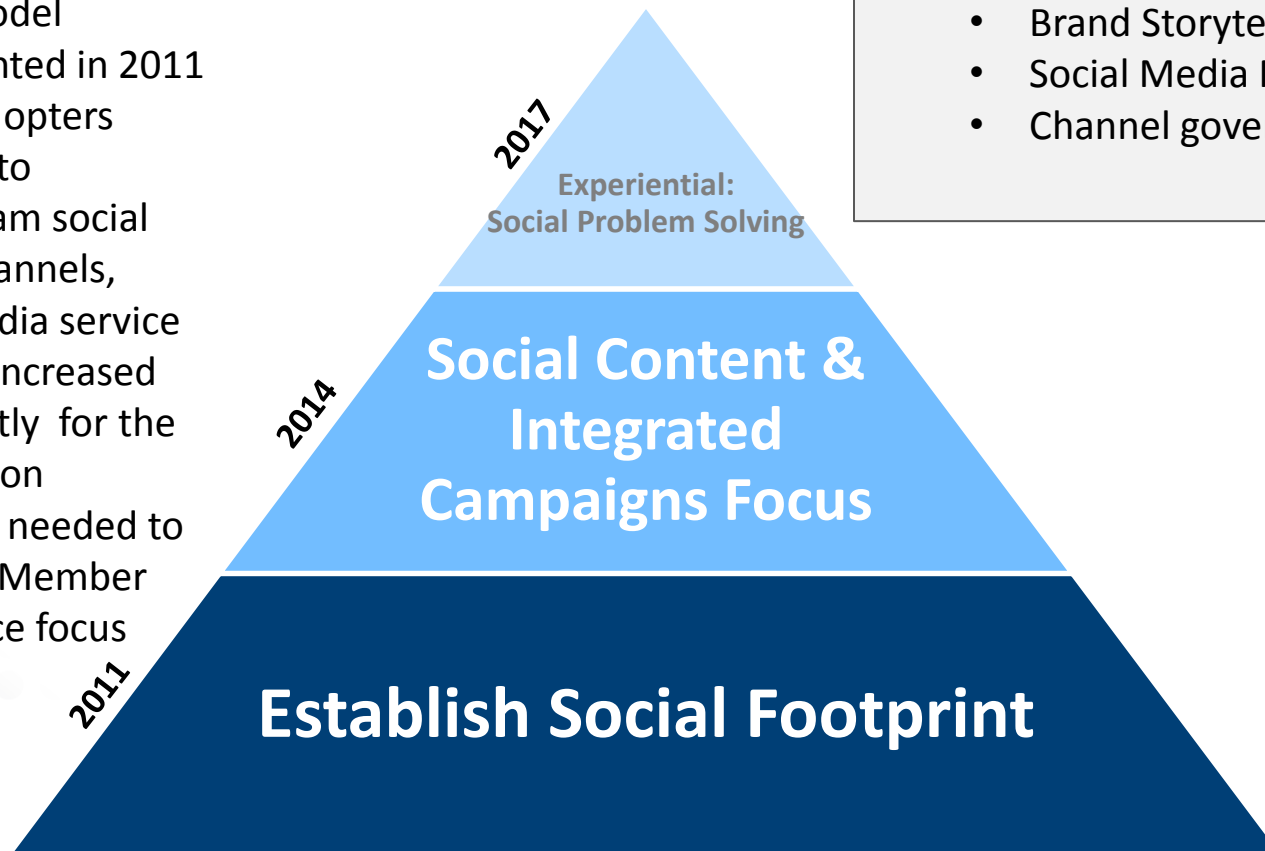
Members were relying increasingly on social media channels, both public platforms and private messaging, to communicate with and about our organization.

- ✓ We did not have a consistent approach for our social media responses or offer scalable member support.
- ✓ We had a history of 12 hour to 5 day wait times, when getting back to member questions on social media. In some instances, we never responded to member service issues.
- ✓ We did not offer a pro-active and sustainable social support model.
- ✓ Our brand and social channel were at risk.



Social Channel Paradigm Shift

- First Tech could not meet the needs of our members with the initial social media model implemented in 2011
- As late adopters moved into mainstream social media channels, social media service volumes increased significantly for the credit union
- First Tech needed to shift to a Member Experience focus



In 2017, First Tech aligned the brand social channels into four key areas:

- **Social Support**
- Brand Storytelling
- Social Media Marketing
- Channel governance

History of the First Tech Federal Credit Union social media strategy

Importance of MX Social Support

- Consumers consider social support to be a vital member support channel in today's environment
- Coverage of the channel is more intricate, as the support channel never closes and members often require immediate assistance
- The members being served during the process, are just as important as the community member skimming the profile page assessing our overall member service standards

Social Member Support MX Roadmap



Current State (short term)
0-90 Days
TOTAL POC: 5
PRIMARY: Multiple

Resource Allocation

- Intake POC: 1 (2)
- First Response POC: 1 (2)
- 90% POC: 1 (8)
- 10% POC: 2 (?)
- Closure: Inconsistent
- Resource Description
- First Response: Marketing
- 90% Resolution: Contact Center
- 10% Resolution: E-Support, CAB, Vendor
- Closure: Inconsistent

Promoter Activation

Resource: Assign Train Integrate

Define Engagement Model

Re-Define SLA Agreements

Communicate Plans Broadly



MX Solution

Primary: Member Experience

Resource Allocation

- Intake POC: 1 (7)
- First Response POC: 1 (7)
- 90% POC: 1 (12)
- 10% POC: 1 (?)
- Closure: 1 (4)
- Resource Description
- First Response: Member Experience
- 90% Resolution: Member Experience
(indirect: CC)
- 10% Resolution: Member Experience
(indirect: CC, ES, CAB, Vendor)
- Closure: Member Experience

Single Point of Contact (POC)

Improved Initial Response

Integrated Omni (CRM)

Consistent Closure

Improved Reporting

Social MX Enterprise Solution

- Do what the big banks choose not to do – provide high quality service
- Provide social media coverage times that are aligned with the busy lifestyle of our membership
- Segment the social media channel by functionality and split between two departments
 - *Member Experience*
 - **Social Support**
 - *Marketing*
 - Brand Storytelling
 - Social Media Marketing
 - Channel governance
- Identify the member support team to absorb the channel coverage, who can triage any 1:1 service matter on demand
- Drive Facebook member response times down, while maintaining a 100% response rate

Program Execution

- **MX Team:**

Introduced four Member Support Managers to the key social communities

- **Social Support Coverage Hours:**

6 am PST – 11 pm PST,
7 days a week,
365 days per year



Very responsive to messages

100% response rate, 6-mins response time

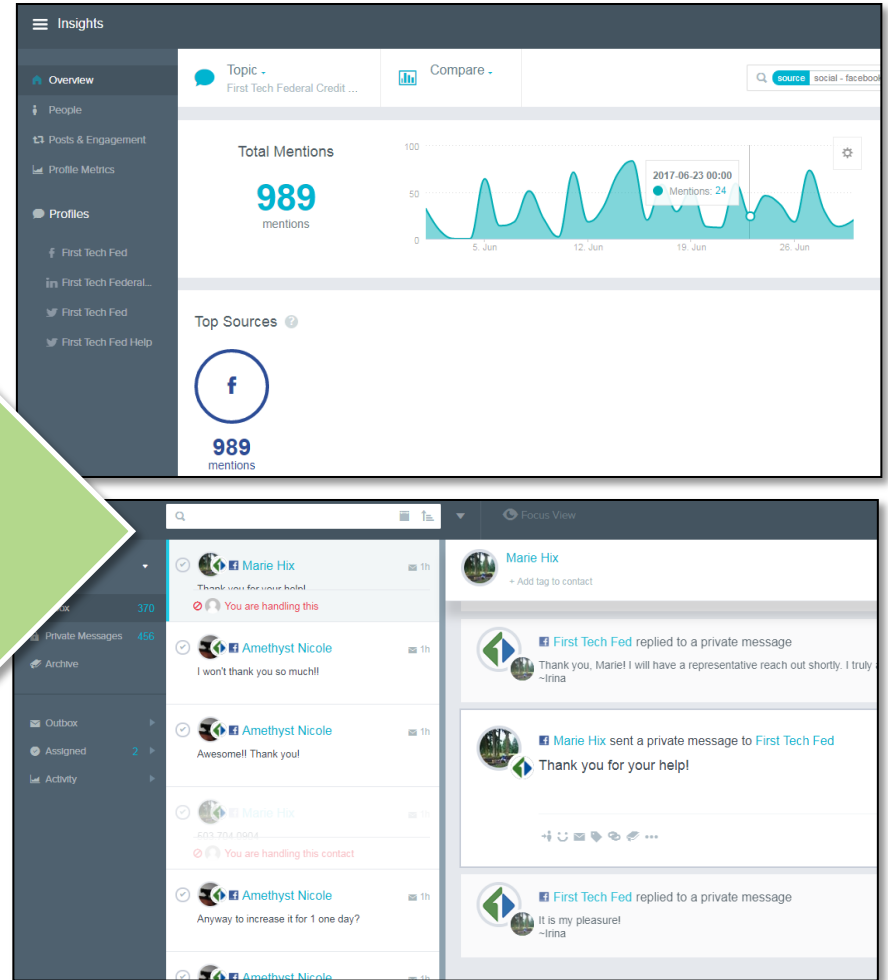
- **Scalable response model:**

The support team provides member service on demand – via both public and private/direct messaging on Facebook and Twitter

Recent MSM Capabilities

Say Hello to Clarabridge CX Social

- All channels are viewed in one location
- Responds from one channel to another
- Interactions are assigned to MSMs
- Mobile app features allow for monitoring outside of regular business hours
- Utilizing expedited analysis and reporting
- Ability to listen across social channels (i.e. competitors)



Evangelizing the Social MX Principles

- First Tech served as the subject matter expert for a very engaged national credit union audience during an industry webinar
- Shared social media support best practices and advising on other tactics that could be leveraged by small credit unions to support the overall credit union movement
- Advised on a practical social support model ideal for small to mid-size credit unions.
 - Overview of tips, developing a scalable model for smaller organizations:
 - Create a taskforce, with a broad group of employees to collectively monitor social media, even for the smallest credit union
 - Choose CU employees based on their judgement, rather than technical skill or title
 - Carefully manage your hourly employees to protect their needs and the organizational labor model

Social Support: Managing Negative Feedback on Social Media



In this exciting webinar, Traci Ketchum Hallinan, Sr. Social Media Director at First Tech FCU will explore the importance of member support within social media marketing programs and the future of this aspect of social media.

When she joined the credit union last April, social support posts were responded to anywhere from 12 hours to 5 days after a member posted. Since then, Traci has implemented an SLA of less than 2 hours...15 hours a day, 7 days per week, 365 days a year.

Key Takeaways:

1. Gain insights into the future of Social Support.
2. Understand the fundamentals of how to manage negative comments on social media.
3. Learn how to convert a negative comment into an opportunity for your credit union.

[CU Content Webinar, Social Media SME: Traci Ketchum-Hallinan, May 2017](#)

Outcome of the Social Support Webinar

- Informally consulted on follow up scenarios, currently facing smaller credit unions nationwide
- Most popular *CU Content* webinar to date
- Webinar positive reviews:
 - *"The last one was FANTASTIC! The speaker was so knowledgeable and although we don't manage our social media content, we do approve it, as well as craft individual responses for comments, reviews, etc. so a lot of what she said was very helpful!" – TN Credit Union*
 - *"I found Traci's presentation to be very informative and well-delivered. Although she manages a much larger org than ours, the info was valuable and can be put to good use." – IA Credit Union*

Social MX Achievement

- Reach 100% response rates on Twitter and Facebook
 - **ACHIEVED:** Reached 100% on Facebook & Twitter
- Meet a two-hour service level agreement committed to the FT board of directors
 - **EXCEEDED:** Average response times and have dropped to an average of 6 minutes
- Assist the industry in developing scalable response models to help small to mid-size credit unions
 - **ACHIEVED:** Served as a subject matter expert for the industry, while answering individual social support questions from other credit unions

Social MX Long-term Vision

- Continuing to evolve the program to ensure that it consistently aligns with the needs of First Tech Federal Credit Union membership
- Leaders are continually evaluating response times, tools and trends relating to the MX Support channel. This will empower the team to keep up with increasing demand