



# Credit Union Enhances Service to Employees, Customers with HEAT in Departments Companywide

At Kitsap Credit Union on Washington’s Kitsap Peninsula, exceeding members’ expectations tops the list of the credit union’s stated values. Staying true to such values the past 70 years, the credit union has picked up several awards for its community-oriented initiatives, as well as thousands of loyal customers.

Maintaining such a high level of customer service – especially as the credit union grows – depends on equipping the institution’s 296 employees with the systems and processes to do their jobs effectively. In 2004, Kitsap’s IT help desk struggled with an outdated, cumbersome system that often deterred technicians from logging calls at all. Even when they recorded calls, the credit union found it nearly impossible to pull accurate reports.

## HEAT CLEAR CHOICE FOR CUSTOMIZABILITY

In the search for a new system, Apropos Consulting directed Kitsap to HEAT® Service & Support™ from FrontRange Solutions. “We knew we needed a system to track calls, so that was the bottom line,” said Susan Whitford, VP, Information Technology at Kitsap. “HEAT was more customizable compared to other products, which would allow us to use it any way we need.”

As Apropos and Kitsap discussed matching HEAT to the credit union’s help desk processes, they identified multiple ways to leverage the system’s capabilities throughout the organization – for any department tracking internal requests. Marketing could log requests from branches for promotional materials. Compliance could keep up with tasks to ease audits. And Facilities could note requests for repairs or furniture.

Apropos first implemented HEAT in IT, customizing the call flows, screens and automated processes to the help desk’s workflow. The consulting firm integrated HEAT with Kitsap’s employee directory, allowing help desk

agents to quickly auto-fill call logging detail screens with employees’ names, locations and other details.

## AUTOMATION ACCELERATES RESPONSES, RESOLUTIONS

Apropos configured HEAT to execute a number of automated processes to accelerate responses and resolutions for Kitsap employees. When employees email the help desk, HEAT’s Auto Ticket Generator creates a help desk ticket with employees’ information, allowing IT staff to skip logging and immediately begin resolving.

Employees can also submit their own help desk requests online, and check on the status of tickets, via the company intranet using HEAT® Self Service’. This further reduces calls to the help desk, freeing help desk agents to focus on resolution.

To help IT meet its service-level agreement with internal customers more effectively, Kitsap tapped HEAT’s Business Process Automation Module (BPAM) to establish call escalation rules. If an agent doesn’t acknowledge and then resolve a request within a set timeframe, HEAT automatically alerts that individual.

Additionally, with HEAT deployed through Citrix, IT staff access it online, anytime, allowing agents to resolve calls while onsite at branches, and one help desk agent to work from home a couple of days each week.

## METRICS SHAPE SERVICE, TRAINING

With system administration training from Apropos and HEAT’s ease of use, agents now log 27 percent more calls, enabling IT to analyze its efforts more comprehensively. Apropos also created several custom reports to draw specific data from the system. Plus, with Crystal Reports classes, the IT staff also easily builds its own custom reports when needed.

**CUSTOMER:**  
Kitsap Credit Union

**INDUSTRY:**  
Financial

**CRM SOLUTION:**  
HEAT® Service & Support™

- RESULTS:**
- With the support of Apropos, Kitsap implemented HEAT in IT, Marketing, Compliance and Facilities – in just one month.
  - IT tracks 27 percent more calls than before, resolves more calls each week, closes each call more quickly, and better tracks its efforts against its service-level agreements.
  - Compliance manages all pre-audit tasks, ensuring audits go smoothly.
  - Though Kitsap has grown by four new branches in the past two years, with the help of HEAT to handle increasing call volumes, it has not added to its IT help desk staff.

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— Susan Whitford, VP,  
Information Technology at Kitsap





**ABOUT KITSAP CREDIT UNION**

From meager beginnings in 1934, Kitsap Credit Union has grown to serve more than 70,000 members, has over \$540 million in assets, and operates 14 full service branch locations, one independent drive-up facility, and 50 automated teller machine locations. Headquartered in Bremerton, Washington, the financial cooperative serves those who live and work on the Greater Kitsap Peninsula. Kitsap strives to be the premier financial cooperative in the community, committed to providing excellent member service based on sound business practices, financial strength and ethical conduct.



**ABOUT APROPOS CONSULTING**

Apropos Consulting is a Denver-based software consulting firm specializing in the delivery of complete IT service desk and customer service solutions. With more than 40 years combined industry experience and over 400 implementations in a variety of help desk and service center environments, Apropos' consulting staff offers unparalleled expertise in the design and implementation of customized solutions based on the award-winning HEAT™ family of service and support applications, as well as a number of complimentary solutions for asset management, remote support, report distribution and real-time metrics.

For internal assessment and to provide metrics to departments organization-wide, IT runs reports on open calls, closed calls and SLA statistics by category and type. Detailed reports help department heads identify staff training needs.

**LIVE IN FOUR DEPARTMENTS IN JUST ONE MONTH**

With IT running on HEAT, Apropos took HEAT to Marketing, Facilities and Compliance. Beyond keeping up with employees' requests for marketing materials, Marketing also manages orders for credit union logowear that come in via the intranet. Again, HEAT auto-populates a ticket with employees' information, making those orders easily trackable.

When external contractors perform assessments of Kitsap's readiness for National Credit Union Administration (NCUA) audits, Compliance logs findings that it and other departments need to address. The institution can then resolve all outstanding issues before the NCUA audit. Apropos also customized call and detail screens for Facilities, which is just beginning to use the system to track its requests.

With the dedication of Apropos and credit union staff, HEAT was running and customized for four departments – in just one month. "In total, we implemented HEAT in four departments in about a month, which exceeded my expectations," Whitford said. "It's amazing to me that each department uses the same database, but have different views and screens, so each can see only their own information. The flexibility of the system really validates our investment in HEAT."

In working with Apropos, Whitford most appreciates that the company empowered Kitsap to continue getting more out of HEAT, on its own. As Kitsap looks to roll HEAT out next

in departments such as Security, Records and Human Resources, it will again turn to Apropos for support.

"A good vendor helps you implement and trains you as you go along," Whitford said. "Not only did Apropos handle implementation but trained our staff to support the application once they left. That was a huge benefit. I've implemented a lot of systems, and vendors that provide that level of training when they are onsite are few and far between."

**RESULTS: COMPANYWIDE TRACKING ENHANCES SERVICE TO EMPLOYEES**

With HEAT managing all IT help desk requests, the staff now logs 27 percent more calls than it did before – representing calls that went untracked and unmeasured before. With more complete data about calls, Kitsap can report comprehensively on its performance on SLAs. Automation and tracking against SLAs has resulted in the staff closing about one quarter more calls by the end of each week. And though Kitsap has few numbers to show resolution times before HEAT, Whitford believes the staff closes each call more quickly, on average.

Though Kitsap has grown by four new branches in the past two years, it has not added to its IT help desk staff. With centralized tracking in HEAT, the team can better support the distributed branches.

Most importantly, departments throughout Kitsap have a system to ensure they serve employees effectively, which in turn helps employees exceed members' expectations. "It was important to be able to leverage this technology across the enterprise," said Colin Morrison, CIO. "The fact that we can tailor configurations to each department with one common system and capital outlay is a major benefit of HEAT."

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