

## Customer Success Story

Product: nGen CIM Suite

Industry: Financial Services

Website:

www.coastcapitalsavings.com

**Business Profile:** Coast Capital Savings is Canada's second largest credit union. It serves over 400,000 customers across the Metro Vancouver and Vancouver Island regions of British Columbia.

**Challenge:** Multiple business lines—including retail banking, commercial banking, investment, and life insurance—with separate customer data made sharing knowledge a difficult task.


**Results:**

- Immediate access to diverse customer data — better responsiveness and eliminating manual research
- Integrated communication channels: face-to-face, e-mail, phone, callback, letters, and eventually instant messaging
- Enterprise-wide view of interactions and opportunities
- Enhanced productivity as 75 Contact Center agents assisting 300,000 members
- Automated customer privacy and regulatory compliance

## Canada's Second Largest Credit Union Excels at Customer Service to Enhance Profitability with nGenera Customer Interaction Management

*"Our commitment is to deliver an unrivalled customer experience. With [nGenera CIM], our staff has the right tools to better manage client relationships and exceed expectations."*

*- Terry Kennerly, Assistant Vice President*



The screenshot shows the Coast Capital Savings website interface. At the top, there is a navigation bar with links for Locations, Contact Us, Careers, Rates, Tools & Calculators, and 中文. Below this is a search bar and an 'Open an Account' button. The main content area features a 'Log in to Coast Online Banking' section with fields for Member Card Number and Personal Access Code, and a 'Login' button. To the right, there is a 'Personal' navigation menu with sub-menus for Banking, Borrowing, Insurance, and Investing. Below the login section, there is a video player with a woman speaking, and a 'Ask me about' section with a list of topics like Free Chequing, Online banking, VISA credit cards, and Hagggle-free RRSP chart. There is also a 'Popular products' section with a dropdown menu for RRSPs and a 'Go' button. At the bottom, there are sections for 'Get our best RRSP rate' and 'Shopping in the US?' with 'More' links.

### The Customer Support Challenge

Coast Capital Savings — Canada's second largest credit union — recently merged with three large credit unions. Through two significant business mergers, Coast Capital Savings has grown to 42 branches, 2,000 employees, and 300,000 members. The nGen Customer Interaction Management (CIM) Suite makes it easy for privacy and regulatory management and provides Coast Capital Savings with an aggregate customer view to assist in delivering seamless customer service. The next step will be to integrate customer information and banking systems.

### The nGenera CIM Solution

The nGen CIM Suite, an integrated and intelligent customer service solution, enables Coast Capital Savings to create instantaneous reports across major lines of business and provide enterprise-wide access to customer records, including opportunities or increased revenues. Additionally, Coast Capital Savings efficiently manages e-mail with nGen Email, enhancing the ability to provide personalized service. nGen Email automates the enforcement and auditing of regulatory and customer privacy requirements. Coast Capital Savings can now leverage customer knowledge across major business lines and serve customers faster, more accurately, and with greater personalization than ever before.



*"With the nGen CIM Suite deployed across our major business lines, staff have a 360-degree view of each client, enabling us to provide a coordinated team effort to deliver greater value to our clients."*

*--Terry Kennerly, Assistant Vice President, Coast Capital Savings*

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Customers want to be understood. Across different divisions within the credit union, the nGen CIM Suite recognizes customers and instantly provides up-to-date history. Previously, each line of business had separate records in legacy systems that required the monitoring and controlling of paper processes. nGenera helps the service team remember client needs and preferences across the enterprise while consolidating customer data on a daily basis. Additionally, upper management can access bank-wide information at any time through a convenient Web portal.

nGenera CIM Suite automates regulatory auditing and enforcement. The government has strict regulations about customer data crossing business lines, from banking to financial planning, without the customer's written consent. Prior to deploying nGen CIM, financial planners at Coast Capital Savings had to search across business lines to access paper files, aggregating customer data in order to see if a customer's approval had been obtained. This process took an average of 10-15 minutes per search. nGenera CIM's policy-driven data automates regulatory processes, filtering customer approvals and making them available immediately. Once approval is recorded, financial planners have access to a full 360-degree view of that customer's information with a few mouse clicks; Coast Capital Savings financial planners estimate that having consolidated information online easily saves half a day per agent each week. Now employees can set a simple filter to immediately see everyone who has signed for a particular line of business.

**nGenera CIM Delivers On-the-Job Training.** According to assistant vice president Terry Kennerly, nGen CIM Professional Services helped to train and extend an inside development group to carry out future integrations:

*"The [nGenera CIM] Professional Services team was exceptional. They performed initial integration and customization, but didn't set themselves up in the consulting game — delivering a black box that we didn't know how to tune. There was a great amount of knowledge transfer from [nGenera CIM] engineers to our staff so that we were able to train our own internal team for further changes and updates. The collaborative working relationship we've built has been one of the biggest advantages of working with [nGenera CIM] — that kind of ROI is continuous."*

With a customer interaction management strategy designed to deliver unprecedented levels of service excellence, Coast Capital Savings will be leading the industry through the deployment of best-of-breed, Web-driven customer service technology and processes.

#### About nGenera CIM

nGenera Customer Interaction Management is the global leader in next generation customer experience solutions. Customers report increased customer satisfaction and measureable cost savings within six months of deployment. With 250% customer growth over three years, more companies trust their customer experiences to nGenera Customer Interaction Management. Customers include Royal Bank of Canada, Saks Fifth Avenue, Canon, Dell, eBay, Epson, Ford, Microsoft, Scottrade, Siemens, Sony, and Sprint.

For more information, visit <http://www.ngenera.com/cim>.