

CASE STUDY

Think Bank: Taking Customer Service to the Next Level with *jhaCall Center*™ Software



jack henry
& ASSOCIATES INC.®

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AMANDA KELLER, VICE PRESIDENT OF THE CUSTOMER SUPPORT CENTER FOR THINK BANK

With all the significant changes in the financial industry, one thing that has remained the North Star through it all is the relationships banks have with their customers.

“There were two major reasons for the acquisition of *jhaCall Center* software,” reflects Amanda Keller, Vice President of Think Bank’s Customer Support Center. Think Bank is a \$1.9 billion bank with 10 branches in Minnesota.

“First, we wanted the ability to track the reason for the call,” says Amanda. “We wanted to better understand why our customers were calling so that we could manage how we’ve structured our call center operations to ensure we’re meeting the needs of our customers. About 80-85% of calls each month are for everyday banking needs. *jhaCall Center* software makes handling those calls very fast and easy and that’s important because we take 20,000 calls on average every month.”

One of the strengths of implementing *jhaCall Center* software is that it captures and authenticates each accountholder’s information. It’s an intuitive, user-friendly technology platform that provides extensive case management capabilities and full integration with their core processing system.

“Prior to having *jhaCall Center* software,” Amanda continues, “our representatives were using manual logs to record the reason for calls, and the resolution provided. They were time-consuming to compose and were difficult for our representatives to access while on a call. And they had to dedicate time to log into these manuals between calls. The whole process made it hard to derive good information about the calls in a timely fashion.”

“The other major reason we chose *jhaCall Center* software was to have a more structured and trackable method for verifying or authenticating the caller,” Amanda observes. “Using the advanced computer telephony integration between the call center

solution and our phone system, authentication questions are automatically presented on the representative's screen in a pop-up, and the representative can quickly pose identification questions to the caller. If the caller is unable to answer the question accurately, the call is ended to ensure that fraudsters aren't able to gain access to sensitive customer information."

Adding the *jha*Call Center solution meant that the manual logs were a thing of the past. And customer service representatives could now see the call history of each caller in real time, along with the notes made by other representatives and bankers who previously worked with that customer. This adds a more personal touch to each interaction and means that each time a customer is transferred to a different person, the new representative can pick up where the other one left off. The customer doesn't have to spend time retelling their story.

Internally, a seamless solution like *jha*Call Center software means more motivated and more productive workers. "Morale among our representatives improved greatly with the implementation of *jha*Call Center software, due to their ability to have the reason for the call easily and quickly selected from a drop-down list and to be able to note how the request from the customer was resolved either from a drop-down list or in easily entered notes," notes Amanda. "Previously, our representatives would often continue to ask questions, in a misguided effort to help the customer get authenticated. The *jha*Call Center software stopped that practice."



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*jha*Call Center software has been particularly valuable during the pandemic, when branches were closed (from March to June and again from November to January). That meant customers that were used to banking in a physical branch had to rely on the call center to get their needs met and questions answered.

"We have 29 total Customer Support Center (CSC) employees, which include 20 customer support representatives and nine bankers. Also, I have two managers in the CSC and about half of our branch staff was on call for CSC duty when the branches were shut down," observes Amanda. "*jha*Call Center software also allowed us the flexibility to go virtual with half of our CSC staff during pandemic peaks, which was very helpful and is a testament to how accessible the software is."

Think Bank's CSC is broken down into two groups. "We have a customer care queue and the Think Online queue," explains Amanda. "Our customer care team handles questions from 'What's my balance?' to how to open new accounts. The Think Online team handles any online banking questions and our bankers are there to step in when customers need higher level service."

There's no denying that 2020 was a year to test the mettle of any organization. Between the pandemic and delivering PPP funds successfully, financial institutions were in the eyes of the biggest storms. But the most successful banks were the ones that understood how to continue to deliver for their customers during their moments of need.

*jha*Call Center software allows banks to serve their customers and members quickly, securely, and efficiently using advanced technology to create a unique personal experience. And that helps everyone.

INSTITUTION

Think Bank

LOCATION

Minnesota

WEBSITE

thinkbank.com

ASSETS

\$1.9 billion

BRANCHES

10

FOUNDED

1961



Amanda Keller

Vice President of the
Customer Support Center
for Think Bank

*With *jhaCall Center*™ software, you can reduce the time customers spend on the phone by quickly handling their calls to satisfaction. Not only does the software automatically provide authentication questions, but it captures and retains the authentication process for every call. In addition, *jhaCall Center* provides an option for stronger verification using a system-generated one-time pass code through the *jhaEnterprise Notifications System*™. By focusing on the caller rather than the technology, you'll create a service edge that helps you delight customers and create efficiency in your phone answering process.*

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**AMANDA KELLER, VICE PRESIDENT OF THE CUSTOMER SUPPORT CENTER
FOR THINK BANK**

Ready to learn more about what *jhaCall Center* can do for your bank's staff and your customers? [Connect](#) with a representative today!

For more information about Jack Henry & Associates Inc.®, call **417-235-6652** or visit jackhenry.com.