

# Del-One Federal Credit Union Rolls Out Engageware Essential Banking Package in Record Time to Support COVID-19 Response

## 1-WEEK IMPLEMENTATION LEADS TO MORE THAN 800 BOOKED APPOINTMENTS IN JUST DAYS

COVID-19 social distancing protocols forced Del-One Federal Credit Union to alter the way they served members. After shutting the doors to walk-in traffic, they selected Engageware's Essential Banking Package to offer members convenient, online appointment scheduling. In less than a week, the solution was live across all open branches, and members were able to meet with branch service specialists at the time of their choosing.

## THE CHALLENGE: CONTINUE PERSONALIZED SERVICE WHILE LIMITING BRANCH ACCESS

When COVID-19 shut down public spaces in mid-March, Del-One made immediate operational pivots.

"We saw a need to continue serving members in a way that upholds our core mission while also keeping employees and members safe," said Horacio Garcia-Korosec, Director of Business Intelligence at Del-One. "That required a scheduling solution that was convenient for all our members to use."

The goal was to implement online scheduling as a way to serve members with the same level of commitment and familiarity as they have for 60 years. However, there was an initial concern that because a high percentage of members are an older demographic and accustomed to stopping in the branch for all types of transactions — from check deposits to loan applications — there might be pushback to an omnichannel experience.

As a temporary solution due to the pandemic, individual credit union staff used ad hoc calendar systems, but there was no company-wide software in place. Scheduling an appointment was a time-consuming process. Associates needed to call or email the member individually to pick a time that worked for both parties. If a member wanted to initiate a scheduled appointment, they called the branch and were transferred to the right employee.



Del-One Federal Credit Union is the largest credit union in Delaware with assets totaling over \$520 million. They have more than 190 employees at 11 branches across the state where they serve more than 72,000 members. Their mission is to help members live a better life, and the member-owned financial cooperative's staff work as member advocates by learning member needs and wants and helping them reach their financial goals.

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“ There are a lot of scheduling options out there, and it can be challenging to compare providers when you have an immediate need. A lot of solutions can look the same. But focus on where you want to be in the future, and that’s where Engageware really stood out. We can see the future of where we want to be as an organization by utilizing even more Engageware features down the road. Its clear that Engageware is always looking ahead at how to innovate and progress the platform, and that’s where we want to go. ”

Horacio Garcia-Korosec, Director of Business Intelligence, Del-One Federal Credit Union

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## FINDING THE RIGHT SOLUTION FOR RIGHT NOW AND TOMORROW

Del-One began evaluating appointment scheduling vendors in late 2019, knowing that they needed to modernize operations, but other business priorities slowed down the search. When scheduling became a must-have requirement following the COVID-19 shutdowns, the team created a scheduling wish list that included:

- Rapid deployment with minimal need for IT to create customized configurations
- Scalability to fit their needs now, and expand as the credit union grows
- Intuitive and easy to use for employees and members
- Access to reporting features that can be customized by staff without the need for additional analytics resources
- Demonstrable value to both internal stakeholders and members

Del-One Chose Engageware’s Essential Banking Package for its scope of functionality, quick implementation timeline, and ease-of-use. After implementation, they were confident the solution would allow them to continue offering in-branch appointments while controlling traffic flow.

“Where Engageware stood apart was their promise that we would be fully deployed within a week.”



## QUICK IMPLEMENTATION: FROM ZERO TO MORE THAN 800 MEMBER APPOINTMENTS IN DAYS

After signing the agreement on a Friday, Engageware's Essential Banking Package was deployed the following Monday. Del-One then spent a week training staff to ensure everyone was comfortable with the functionality and member messaging.

Within seven days of completing the purchase, the Engageware "Schedule an Appointment" button was active on the website, and in the next five business days, more than 800 Del-One members had booked appointments. In the first two full weeks of availability, Del-One had successfully confirmed more than 2,300 appointment bookings across all active branches.

## SUCCESS: ENGAGED MEMBERS AND IMMEDIATE INSIGHTS

Despite staff's initial concerns of pushback, especially given the stressful conditions of the larger pandemic, members are happy with the new booking option. While Del-One shifted many transactions and appointments to occur virtually, there was still a need to offer limited, in-branch appointments. For those meetings, Garcia-Korosec notes that members are thrilled to meet face-to-face (following safety practices) with the employees they know and trust.

For overburdened staff, online scheduling lightened the workload. Now, employees can focus on core member services or team management instead of administrative issues.

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“ Staff feedback has been fantastic. Branches are busy, and Engageware has taken away the stress related to manual scheduling. ”

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Adding Engageware also helped Del-One plan and then shift resources and branch utilization based on member demand. They've temporarily closed or limited some branch activity while ramping up resources in other locations where additional appointment bookings were surging.

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“ Making those changes was as simple as clicking a button,” said Garcia-Korosec, “and overall I've been really surprised at how easy it was to pick-up and use Engageware.” ”

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## THE FUTURE FOR DEL-ONE IS EVEN MORE PERSONAL

Once the worst of the pandemic restrictions subside, Del-One wants to dig deeper into appointment data to help drive even more meaningful member experiences. They plan to expand their Engageware Scheduler instance to:

- Better understand lobby management and wait times
- Offer text messaging for reminders and notifications
- Boost already impressive NPS scores
- Drill down on how individual employees impact member satisfaction
- Leverage native survey functionality to gain even deeper insights into member preferences