



GENERAL MILLS
FEDERAL CREDIT UNION



Customer Success Story



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— Kathy Dahl, Marketing Specialist, General Mills Federal Credit Union



General Mills Federal Credit Union uses WebEx WebOffice to streamline communications



INDUSTRY

Financial Services

SUMMARY

The General Mills Federal Credit Union (GMFCU), with 20,000 customers and 65 employees in 5 states, uses WebEx WebOffice extensively in its daily operations — to improve customer service, streamline interdepartmental communications, facilitate employee communications and boost employee morale.

ABOUT GENERAL MILLS FEDERAL CREDIT UNION

Line of Business
Credit Union

Headquarters

Minnetonka, MN

Number of Employees

65

WebEx WebOffice User
Since April 2003

Customer Business Profile

The General Mills Federal Credit Union (GMFCU), headquartered in Minnetonka, MN, serves 20,000 customers.

The Situation

Before WebOffice, GMFCU had a shared drive where employees looking for a document, such as a bank policy, or regulation, etc., would have to know what folder it was in and the exact name of the document. In addition, employees received email notification of rate changes; some employees were saving those emails indefinitely. It was very cumbersome and required a lot of storage.

Finally, GMFCU had an internally built intranet that only its IT person could make additions to, and it wasn't well utilized.

The Solution

GMFCU now uses WebEx WebOffice to facilitate internal communications via the Document Manager, Database Manager, Group Calendar, Announcements, Opinion Polls and Web Links, and there's no need for an IT person to manage WebOffice.

The Benefits

WebEx WebOffice allows GMFCU to streamline interdepartmental communications and gain operational efficiencies.

The WebOffice Database Manager facilitates work between the Consumer Lending Department, the Mortgage Department, the tellers and so on.

For instance, when phone center employees get requests for loans, they put the requests into a database where the loan department can retrieve them immediately.

GMFCU uses the WebEx WebOffice In/Out Board database to improve customer service by letting every employee see at a glance who is in or out of the office, and who's available to help a given customer with their expertise.

Document Manager, "What's the Buzz?"

"We absolutely love the WebOffice Document Manager because it's the definitive place where all our documents — policies, procedures, loan and savings rate sheets, etc. — are stored and its searchability is great!" says Kathy Dahl, GMFCU Marketing Specialist. The best and latest version of any document is always in WebOffice, which GMFCU has nicknamed: "What's The Buzz?"

"The Buzz" facilitates a wide range of communications — between management and employees, and among employees. For instance, GMFCU uses WebOffice's Announcement function to post messages such as: The bank president's daily motivational message for employees; the monthly incentive goals; service enhancements; special rates; notifications to employees; and non-operational announcements on United Way fundraising or the employee summer outing.

Online Calendar Syncs Easily

GMFCU employees use the WebOffice Online Calendar in place of Microsoft Outlook, to schedule not just business and personal appointments, but also facilities and equipment. The WebOffice online calendar easily syncs with Microsoft Outlook for the few credit union employees who need to meet on a regular basis with General Mills' employees who use Outlook.

Dahl says she puts all the company events on the WebOffice Online Calendar, plus employees' birthdays, work anniversaries, and animated images.

Employee Portal

GMFCU is using WebOffice Web Links to create a convenient portal for employees to access all sorts of information that relates to their jobs and their company benefits. Within "The Buzz" portal there are links to GMFCU's 401k Folder, the intranet of General Mills, a time card system, and HR materials.

GMFCU has also set up folders in WebOffice for all the different work areas — accounting, card services, consumer lending, etc., — and within those folders are lists of 10 or 15 links that those departments are using constantly.

This has replaced using Microsoft Outlook's "Favorites" in email for storing multiple links.

"If there's any update to these departmental links, everyone gets it. It's a great way to keep your links organized. This portal is so very convenient for people," Dahl says. The bank encourages employees to keep 'The Buzz' open on their desktops all day long.

Boosting Morale

Beyond all this practicality, GMFCU has also found ways to use WebOffice for having fun and boosting employee morale. GMFCU has used the WebOffice Discussions Forum for organizing a book club. The credit union has a database called "BuzzBay," instead of eBay, where employees can sell anything from Girl Scout Cookies to a couch or TV set. GMFCU also has a database, 'Post It,' for events such as bridal or baby showers, happy hours for retiring employees.

And, the bank uses the WebOffice Opinion Polls to gauge employees' opinions — like 'What type of training would you like for "Lunch and Learn"?'

HIGHLIGHTS

- GMFCU uses the WebOffice Document Manager to store all documents — policies, procedures, loan and savings rate sheets — and have nicknamed it: "What's The Buzz?" It facilitates a wide range of communications — between management and employees, and among employees.
- The WebOffice Database Manager facilitates work between the Consumer Lending Department, the Mortgage Department, and the tellers.
- GMFCU uses WebOffice as an Employee Portal with links to its 401k Folder, the intranet of General Mills, time card system, and HR materials.
- GMFCU employees use the WebOffice Online Calendar in place of Microsoft Outlook to schedule business and personal appointments, plus facilities and equipment.
- GMFCU uses the WebEx WebOffice In/Out Board database to improve customer service by letting every employee see at a glance who is in or out of the office, and who's available to help a given customer with their expertise.

