



“With WebEx WebOffice, we have a complete suite of productivity applications to help all of our employees work more efficiently. And, we’re saving thousands in IT salary dollars per year with WebOffice, not only because we didn’t have to build a solution ourselves, but because we don’t have to hire a person to maintain it.”

— Joan Zazzaro, IT Manager, TEG Federal Credit Union

TEG Federal Credit Union uses WebOffice as cost-effective communications platform



INDUSTRY

Financial Services

SUMMARY

WebEx WebOffice allows TEG Federal Credit Union employees to share news and information instantly across its five offices and with members of its Board of Directors working from home.

WebOffice allows them all to save time in accomplishing daily tasks, including: keeping tellers and financial service representatives up-to-date on the latest rate changes and financial offerings; sharing confidential files between the credit union’s executive office and board of directors; tracking the credit union’s equipment inventory for Federal Regulators, and more.

ABOUT TEG FEDERAL CREDIT UNION

Line of Business

Credit Union

Headquarters

Poughkeepsie, NY

Number of Employees

75

WebEx WebOffice User Since 2002

Customer Business Profile

Founded in 1969, TEG Federal Credit Union in upstate New York is a member-owned, not-for-profit financial cooperative association. TEG offers a broad range of financial products and services and is committed to satisfying the personal financial needs of its members. The credit union hosts five separate offices in Poughkeepsie, Hyde Park, Fishkill, and Poughquag.

The Situation

TEG Federal Credit Union needed a simple, affordable communication infrastructure to save time and bring the latest credit union information to their employees and Board of Directors.

Employees at TEG first expressed the need four years ago for a way to access business information and announcements from TEG’s five offices and from home, if necessary. They wanted to be better informed about credit union policies and procedures, as well as current news in the financial industry.

Busy credit union tellers with limited computer access needed a central site to log into at the beginning of each day. Human Resources requested an online platform to store and distribute training information for new employees. And management at TEG also required an easy, consistent method for communi-

cating with the association’s Board of Directors and Federal Regulators. Most of all, TEG needed a web-based solution that was secure, user-friendly and affordable.

In response to TEG’s increasing communication demands, IT Manager Joan Zazzaro began researching options for an online solution. What she found was that it was far too time consuming and expensive to even consider building an in-house solution from scratch. TEG did not have the budget for this, and Joan didn’t have the resources. She also needed a solution that could be up and running quickly, and building something from the ground up would take months.

The Solution

Finally, a simple inquiry on a popular Internet search engine led Zazzaro to what was then known as Intranets.com, now called WebEx WebOffice.

Its hosted online collaboration service, featuring a powerful set of integrated applications was exactly what she’d been searching for to address the diverse needs within TEG. “I knew right away that the WebEx WebOffice service would work for us,” says Zazzaro. “It was immediate, manageable, flexible and could be accessed straight from the web. The best part was the reasonable cost. Even though WebOffice was not a budgeted item, our Board approved it right away.

“*WebOffice, essentially, pulls the weight of another IT person. With WebOffice, we have a powerful collaboration solution, for a small monthly payment. WebOffice really pays for itself.*”

— Joan Zazzaro, IT Manager, TEG Federal Credit Union



We all felt very comfortable trying it out because of the month-to-month payment plan. If it didn't work out, we weren't investing a great deal of money up front.”

The Benefits

Zazzaro's decision to go with WebEx WebOffice paid off almost immediately. TEG employees began using the WebOffice applications not only to share credit union news and information, but also to save time in the accomplishment of daily tasks.

For example, the WebOffice Database Manager is a popular tool within TEG. The inventory database created by Zazzaro helps her track information on all internal equipment, including name, model number, location and status. Since Federal Regulators require inventory accountability from the credit union, Zazzaro uses the permission feature to grant them and the CFO access to her database on WebOffice. Although she can easily print out a formatted report, she no longer needs to do this in order to share the information. This saves her significant time whenever an update is necessary.

TEG's Board of Directors has also taken advantage of WebOffice. They have their own folder in the Document Manager application where all board reports are stored each month for easy access. Zazzaro points out that although this may seem like a fairly simple idea, it actually solved tremendous distribution problems.

“Our Board Reports are quite lengthy. In the past, we sent them out to everyone via email, and that was a complete nightmare. The files often did not go through and downloading was difficult, especially for those at home working with AOL or a dial-up modem. Now that these documents are stored on WebOffice, the distribution process is a non-issue. The reports are posted, a link is automatically sent out to members alerting them, and that's it. Everyone can view them in a matter of minutes, and it has cut down the frustration level considerably.”

Speaking of frustration, Zazzaro says it's almost painful to recall the days when TEG tried to manage its group documents via Outlook Public Folders. “Version control was impossible. We had employees making changes to credit union policies while others were trying to access them. We had overwrites to previous edits, and no one was clear on which version was correct. The WebOffice Document Manager eliminated all that confusion. Now we use the check in/check out feature and the latest version is obvious. What a relief to regain control.”

As an IT Manager, Zazzaro is grateful to WebOffice for its time saving benefits, especially when it comes to problem solving. She notes that employee phone calls to both her department and Human Resources have been nearly eliminated now that WebOffice hosts a section where users can view process issues

and suggested solutions. For example, if a credit union member did not receive their monthly statement, TEG employees can go to WebOffice and find a list of items they might check to help figure out why. They can do this on their own instead of calling IT, HR or any number of other departments for help. Zazzaro points out that nine times out of ten, the problem is solved via scenario solutions found on WebOffice. “My staff never has to get involved and can focus on other priorities. This may seem like a minor detail, but when you add up all the time saved — at least several hours per week — it's a huge deal.”

New product and services, member specials, and fee schedule information is frequently posted in the WebOffice Announcements section by TEG's Marketing and Human Resources Departments. This makes it easier for employees, especially Tellers and Financial Services Representatives who interact daily with customers, to get up to speed on the latest financial offerings.

“WebOffice is the perfect reference area,” says Zazzaro. “When our employees are well-informed about what we do and the services we offer, it helps build a solid reputation with credit union members. That's good for business, and it makes WebOffice, the tool we use to communicate this information, a critical element in our overall commitment to employees and customers.”

Reflections on the WebEx WebOffice Solution

After just four years with the service, TEG's corporate WebOffice is used daily by 75 credit union employees. Zazzaro continues to be impressed with the service and the diversity of its applications. She particularly notes the diligence of the WebEx WebOffice Customer Service. "Your Customer Service and Sales Team Representatives are some of the most helpful folks I've ever come across. They answered all my questions during the initial stages and were there throughout the process whenever I needed them. That's something you don't see too often these days, and it's very refreshing. WebOffice really made a difference for us here at TEG. In a nutshell, it made all our daily tasks easier. It improved communication among our five offices and with the other professionals who cross our path. It's been a timesaver from the very beginning and is so simple to use. I can't imagine being without it. WebOffice is an integral part of our business now and for the future."

"When our employees are well-informed about what we do and the services we offer, it helps build a solid reputation with credit union members. That's good for our business, and it makes WebEx WebOffice, the tool we use to disseminate business information, a critical element in our overall commitment to both employees and members."

— Joan Zazzaro, IT Manager, TEG Federal Credit Union

HIGHLIGHTS

- TEG Federal Credit Union uses WebEx WebOffice to meet its need for an affordable, user-friendly communication infrastructure that grants easy and controlled access of credit union information to their employees and Board of Directors.
- WebEx WebOffice provides TEG with a secure solution that serves the communication needs of its five offices in upstate New York.
- A variety of integrated applications allow employees to organize, share, coordinate, and track daily credit union activities and view service offering information quickly, easily and from any location.
- Through the WebEx WebOffice solution, TEG establishes a group of well-informed employees who in turn serve their customers better and contribute to the association's overall success.

