



Susquehanna Bancshares, Inc. increases contact center service levels and agent satisfaction with Calabrio Workforce Management



Susquehanna Bancshares, Inc. Case Study

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Background

Susquehanna Bancshares, Inc. (NASDAQ: SUSQ) is a regional financial services holding company headquartered in Lititz, Pennsylvania. With offices in Pennsylvania, Maryland, New Jersey and West Virginia, they operate numerous commercial banking, wealth management, insurance and leasing companies.

Susquehanna began operations in 1982 under the premise of preserving community banking and has evolved into a high-performing financial holding company built upon the best qualities and strengths of local decision making. Susquehanna has completed more than 32 acquisitions, but each bank operates under its own name, has its own board of directors, makes its own credit decisions, and sets its own rates and minimums on deposits.

By staying close to each market, Susquehanna can deliver superior customer service. Susquehanna supports its banks with consolidated operational functions and provides asset liability management, investments, loan review, human resource management, finance, marketing, and training support, among other services.

The company's decisions are supported by centralized best practices and utilize technology that delivers superior customer service. The Susquehanna portfolio of financial products and services is locally managed in order to provide maximum value to their customers and communities.

The Challenge

Susquehanna was outgrowing its manual processes of using spreadsheets for forecasting and agent scheduling. It needed a more efficient and accurate system to manage ever-changing call volumes and quickly determine the optimal agent scheduling while taking agent shift preferences into account.

Debra Miller, Assistant Vice President of Alternate Retail Services for Susquehanna, explained why she selected Calabrio, "We were looking for a workforce management leader that gives great customer service. During our due diligence process, we heard rave reviews about the level of service Calabrio gives to its customers. Further, we were excited to begin using a browser-based application to minimize the internal IT support needed for this initiative, unlike other enterprise systems."

The Calabrio Solution

After carefully evaluating a range of solutions, Susquehanna implemented Calabrio Workforce Management (WFM) software. Calabrio WFM gave Susquehanna immediate visibility into its customer contact center operations, enabling to immediately enhance customer service and lower expenses.

Susquehanna was able to use current staff more intelligently by identifying hours of coverage that were over and under-staffed, which impacted profitability and customer service. With Calabrio WFM, Susquehanna had the real-time data and flexibility to correct staffing issues without hiring additional staff. Part-time employees were now better scheduled to fill in under-staffed shifts. The more efficient use of current staff translated into lower expenses for the customer service center.

Agents are now consistently able to meet service levels, which has made a noticeable difference on customer service. Agents also report greater job satisfaction now that they have the ability to view their schedules online and the freedom to trade shifts with other agents.

"Calabrio outshined several competing systems we evaluated," Miller continued. "The most important areas for us were product superiority, support, and price. We are happy with our decision – from the beginning, the training and support we received from Calabrio's support staff has been excellent. Our results and the ongoing level of support from Calabrio continue to exceed our expectations."

About Susquehanna Bancshares, Inc.

- > Founded: 1982
- > Headquarters: Lititz, Pennsylvania
- > Assets: \$8.2 billion
- > Locations: 163 branch offices in
 - Pennsylvania
 - Maryland
 - New Jersey
 - West Virginia

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