REZOLVE.ai

CASE STUDY

Patelco
CREDIT UNION

How Patelco Implemented AI-Powered Employee Service Desk within Microsoft Teams for Team Training, Knowledge Management and Rollout Assistance

Rezolve.ai has been helping Patelco for 3 years to help improve employee support and increase employee satisfaction.

COMPANY OVERVIEW

Patelco Credit Union is a community credit union that encompasses most of Northern California, particularly the San Francisco Bay Area.

Founded in 1936, Patelco Credit Union is now a full-service, not-for-profit financial cooperative dedicated to helping our members and communities prosper.

With $7 billion in assets and over 360,000 members nationwide, Patelco is one of the largest credit unions in the nation.

PROBLEM STATEMENT

Major requirements of Patelco

- Patelco employees were demanding better support. Their employees– who were facing a change in application landscape – were struggling to get the right support at the right time.

- Patelco rolled out a new online banking and bill payment platform,
  and the IT Help desk was not able to keep up with the employee questions and request.

- Patelco employees were sending emails and making phone calls to get resolution to their issues, and the MTTR was unacceptably high.

- Service Desk agents were struggling to maintain the required KPIs,
  and were working in a high pressure environment.

## Implementation Timeframe: 2 weeks

IMPLEMENTED SOLUTIONS

How Rezolve.ai helped Patelco

Knowledge Base + Digital Assistant + Service Desk

1 CHAT- BASED INTERFACE

- Implemented within Microsoft Teams
- Chat with your Digital Assistant Information in Bite-sized nuggets Answers, procedures, documents
- Easy hand-offs to human agents when chatbot cannot help
- Hand-off either in the way of "live-chat" or "ticket creation"
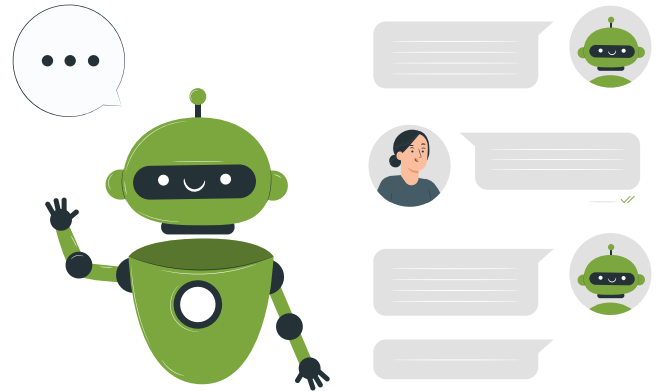
POWERFUL TICKETING SYSTEM 2

- Tickets simply by having a chat conversation within Microsoft Teams
- Minimized back and forth with users through Smart Tickets
- Tickets created within 15 seconds to minimize friction
- Employees no longer have to remember their ticket number or wait for their inquiries to be resolve

3 "TWITTER AGE" KNOWLEDGE BASE

- Employees can access Rezolve.ai app within Microsoft Teams and ask questions
- Information in text, images, videos or other engaging content formats
- Byte Sized information that is relevant and easy to understand

RESULTS

How Patelco benefited after implementing Rezolve.ai

3,500
Issue auto-resolved in first 4 months

34%
decrease in support calls to Service Center

10-15 SEC.
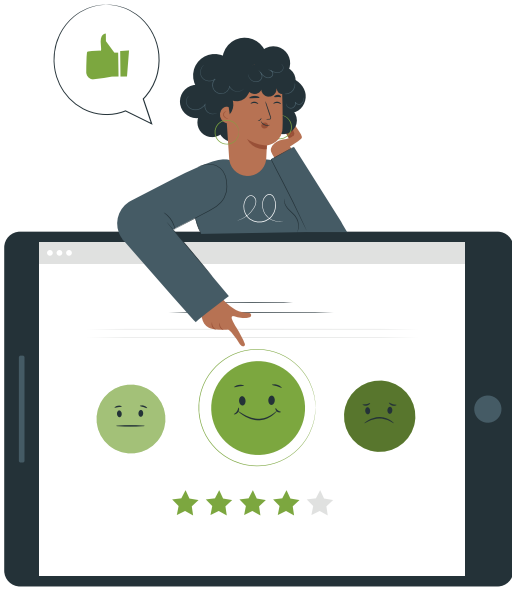Average time to find self-help in order to avoid a 6-minute average support call

700+
Number of issues auto-resolved per month today

30,000
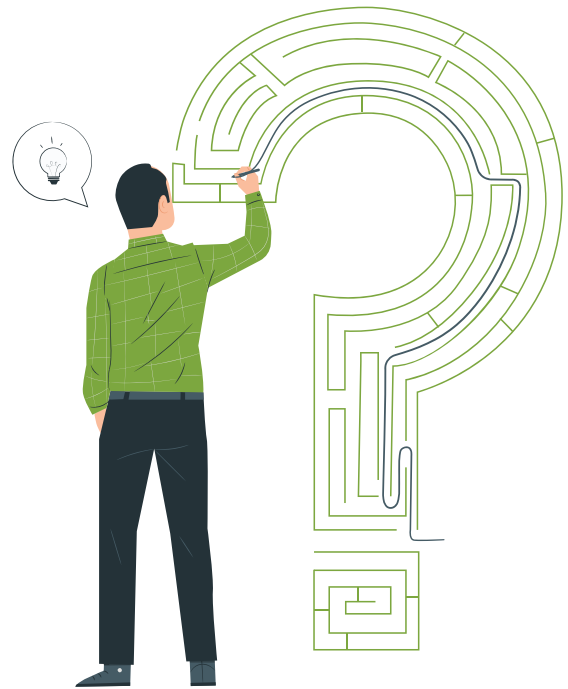Number of issues auto-resolved to date

4%
estimated improvement in employee productivity

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Overall employee satisfaction increased by 257 bp, from 6.42 to 8.99 in 1 year

First contact resolution improved by 14 %

Average handle time was decreased by 19.6 %

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BRING EMPLOYEE SERVICE DESK TO MS TEAMS