



Case Study

Expanding Credit Union Member Support to Elevate Experience

Strategic CX delivery, tech-powered approach turn unexpected volume surge into stronger service

The challenge

Strengthening member commitment

A U.S.-based credit union has always focused on putting members first. To support that commitment, the organization aimed to make service simpler and more personalized.

Initially, the organization previously relied on a partner with a shared-services model whose teams supported multiple credit unions. Confused about who they were serving, those agents provided inconsistent service and members became frustrated.

Existing on-prem phone systems added further complexity. Calls bounced between multiple queues, causing more transfers and members often having to re-authenticate each time. The credit union wanted to streamline the process.

With a vision for both immediate improvements and long-term transformation, the credit union turned to TaskUs. Our partnership became especially important when call volume jumped unexpectedly by more than 800%.

The solution

Building trust at every step

We started working with the client even before the project officially kicked off, offering a consultative approach during the discovery phase. Our tech team reviewed the credit union's phone system, recommended smarter configurations and supporting tools that enhanced the experience for both members and staff supporting them. That groundwork became the basis for what came next.

Once we were officially on board, here's how we helped:

Creating a seamless experience

We formed a dedicated member care team to handle Tier 1 inquiries like balance transfers, mobile banking, loan applications and account management. With identical tools, processes and resources as the in-house team, our teammates delivered an experience that felt consistent and familiar to members.

Fixing the phone system

We guided the client to move to a single, modern phone platform to replace its on-prem environment and eliminate repeat authentication. The new platform also pulled all inquiries into one queue so members would spend less time waiting and repeating themselves. Before launch, we tested the system first to ensure the in-house team was set up for success.

Applying AI for efficiency

To further decrease wait times, we introduced AssistAI — our proprietary GenAI-powered knowledge mining tool. AssistAI helps teammates surface relevant information quickly, raising staff confidence and service quality.

By proving our performance, we earned the credit union's trust to take calls directly — no more routing through its in-house team. Members now get quicker access to help and a smoother experience from the very first touch.

Result

91% Average Quality Score



About TaskUs

TaskUs is a leading provider of outsourced digital services and next-generation customer experience to the world's most innovative companies, helping its clients represent, protect and grow their brands. Leveraging a cloud-based infrastructure, TaskUs serves clients in the fast-growing sectors, including social media, e-commerce, gaming, streaming media, food delivery and ride-sharing, technology, financial services and healthcare. As of June 30, 2025, TaskUs had a worldwide headcount of approximately 60,400 people across 30 locations in 13 countries, including the United States, the Philippines, and India.

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