



Credit Union Equipment Maintenance Program: Secure, Efficient, Cost-Effective Solutions

AT A GLANCE



Client

- Credit Union



Assets

- \$9 billion+



Branches

- 61

KEY METRICS



\$741,000

OEM Service Contract Cost



\$555,750

SU Service Contract Cost



\$185,250

Total Savings

BENEFITS



Comprehensive Coverage



Ease of Use



Financially Capped Budget

CHALLENGES

This large Texas based Credit Union had entered into a multiyear agreement without altering the cancellation terms of the large service contract. The Credit Union was "stuck" and obligated to the contract for 12 additional months when Specialty Underwriters first reviewed the agreement.

SOLUTION

The Credit Union's team was contacted six months later to confirm the then current equipment inventory, # of sites and savings available. The team confirmed that they would like to move forward with the SU quote and the current vendor was provided with notification of non-renewal. It was communicated back to SU that once the vendor understood they were not losing the business and that the CU would retain them for all service calls and preventative maintenance, the vendor was agreeable to the change.

RESULTS

The Credit Union's internal call center remained the focal point of contact for service calls from the branches. This kept the current process in place that the branch personnel were accustomed to. Service requests from the call center are transmitted to SU via email with a "bounce back" email from SU to the call center confirming the service request along with service ticket data. The transition to the SU program was seamless and the Credit Union entered into a 3-year agreement with SU resulting in a savings of \$555,750. Additionally, SU provided secure web-based management reporting to the Credit Union's call center in order to provide key insight to every service call that is placed and its results.

"The online equipment reports provided by SU have enabled management to pinpoint areas of equipment failures so we can make informed decisions relating to new equipment purchases."

-Chief Financial Officer

GET IN TOUCH



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