

Callahan & Associates

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A Practical Approach To Upgrading Contact Centers

Callahan Client Webinar Series



Our Speaker



Kevin Miller, CEO
Travis Credit Union

About Travis Credit Union

- Mission: We are dedicated to building lifelong relationships with our members to help them achieve their financial goals.
- Credit Union Size: \$5.7B in assets / 271,000 members.
- Serve: Consumers & small businesses in Northern California.



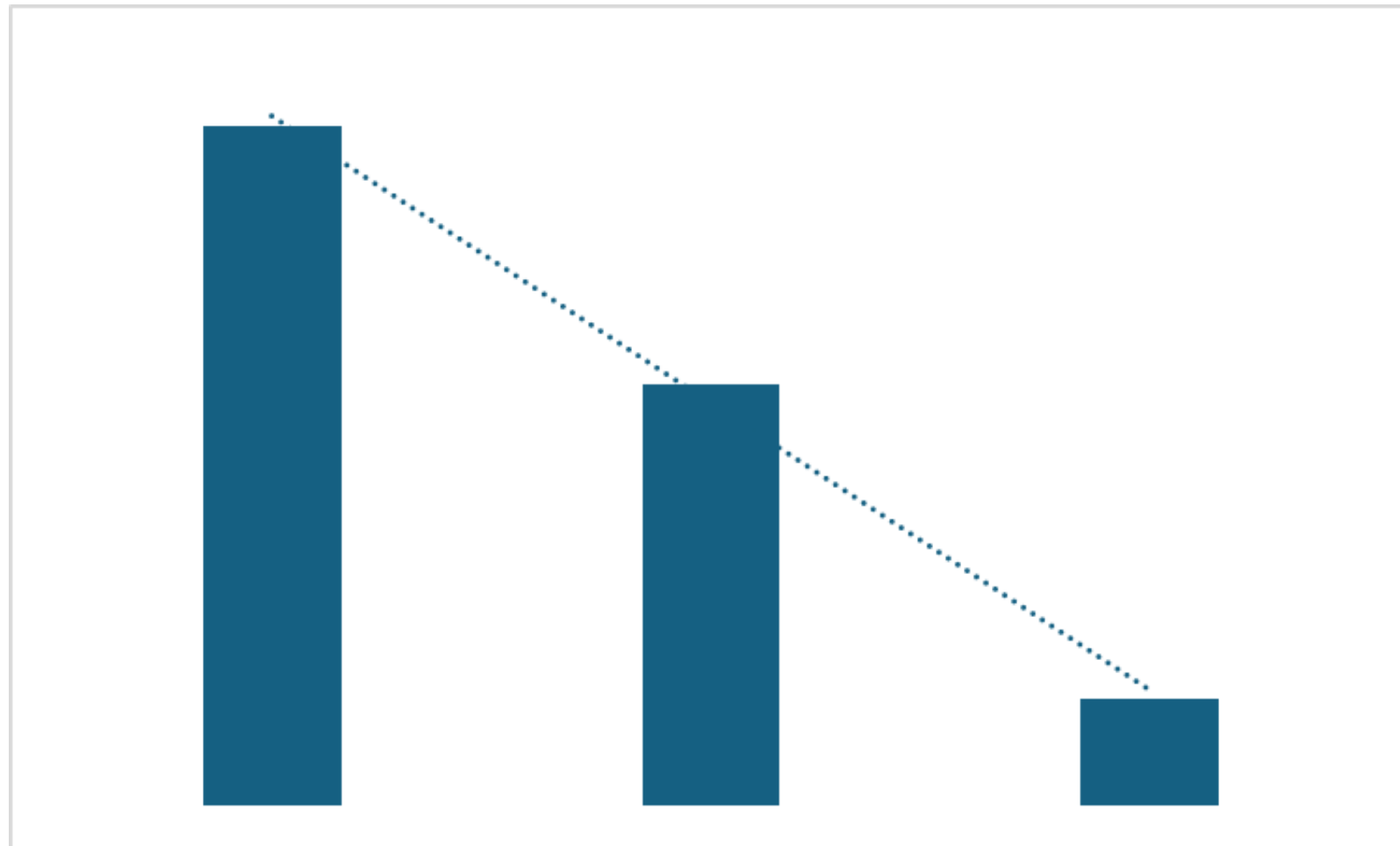


The Challenge

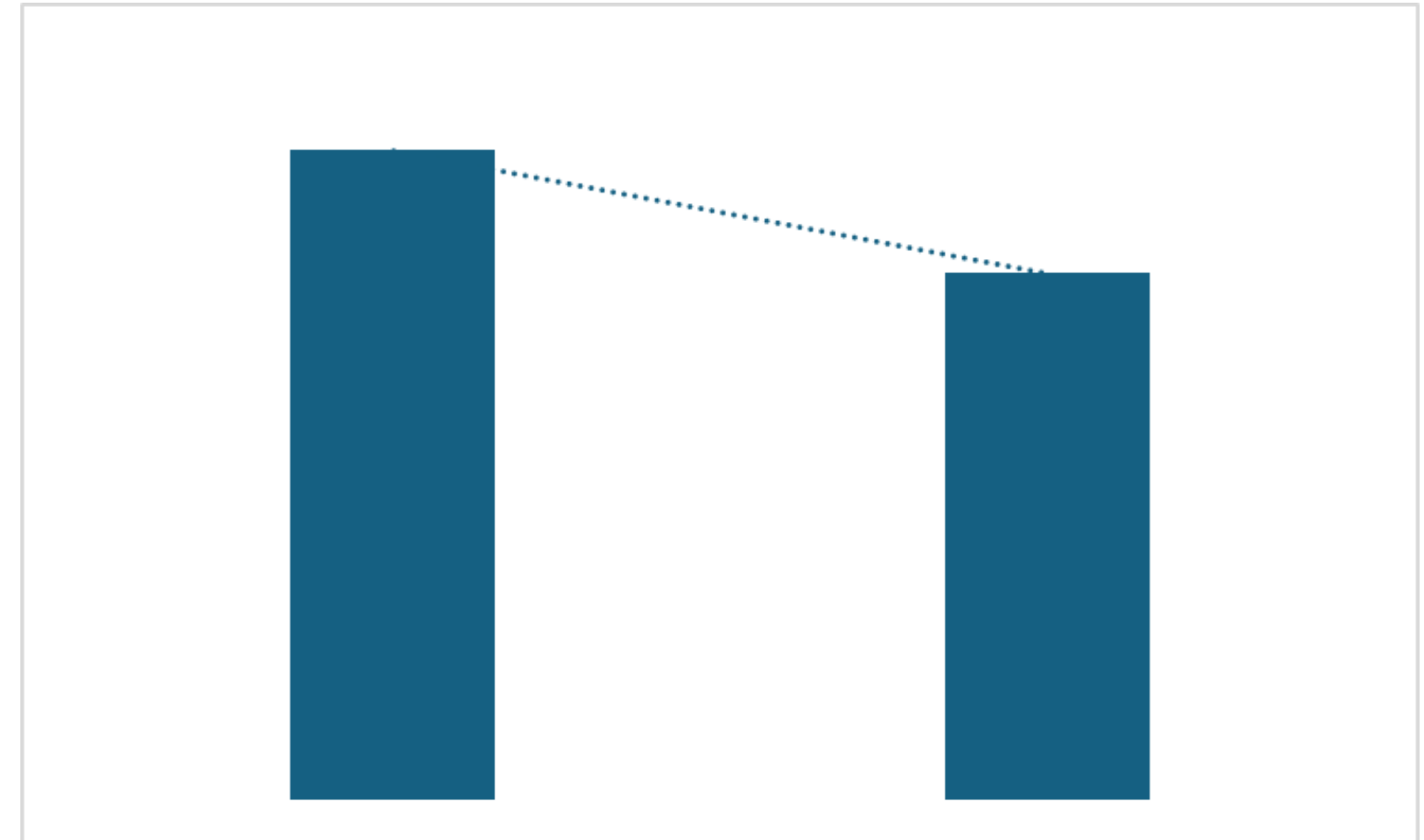
- Coming out of the pandemic our contact center faced challenges:
 - Long wait times for members.
 - High team member turn over and declining engagement.
 - Confusion over ownership of key capabilities.
- There was no sole culprit - it was a *mix of issues*.
- In less than one year, everything changed.

The Trends: Wait Time & Turn Over

Contact Center Wait Time



Contact Center Turnover



An Approach that Works

- Regardless of title, role or challenge, a logic you can apply to all business decisions.
- Ask everybody the same three questions.
- And those questions yield a plethora of data *that points to what's top of mind.*
- That's your starting point.

3 Questions

When Travis Credit Union CEO Kevin Miller approaches a business decision, he gathers data by asking people the same three questions:

- What's going well?
- What's not going well?
- If I had a magic wand, what's one thing you'd change about the organization?



Framing the Problem

- Importance of naming the problem or issue.
- Be hard on the problem, not the people.
- Shift pain points from an “I” to “we” problem.
- Instill a cadence to drive resolution i.e., you can’t delegate this away.



Our Approach

- Defined the problem to be solved and measurements of success.
- Documented all the know issues- real or just perceived.
- Ranked issues based on impact and timeline and assigned owners.
- Weekly stand-up with executive team to review progress, roadmaps and next steps.

The Results

- These and other changes helped us reduce wait times by more than 50% within a year. *Today, wait times are within the industry average.*
- The big takeaway for credit unions of all sizes is to simply enable teams to do their jobs in the most effective and efficient ways possible.
- If something isn't going well — not like a little oops, but everyone agrees it's stuck — your obligation as a leader is to get involved to help make it better.
- Get a group of people to agree on what the problem is and the three things you think caused it or could fix it.
- It's easy to look for a silver bullet, but such a simple solution doesn't exist. The real work comes from sitting down, understanding the problem, and taking the necessary steps to fix it.



Questions?



Presented by Guest Speaker

Kevin Miller