



“ SRM combined deep expertise with outstanding flexibility with their team going above and beyond to support us from a different time zone, shaping their approach to fit our needs and budget. The partnership ensured our team felt supported at every stage, making this engagement both productive and energizing, while identifying options for us that we had not considered. We look forward to working with SRM as we continue to enhance our operations and, most importantly, our member experience.

**Anneliese Elrod, COO & Project Sponsor, Westerra Credit Union**



## Westerra Credit Union and SRM: Navigating Contact Center Technology Selection & Contract Negotiation Together

Westerra Credit Union is a Colorado-grown, member-focused institution dedicated to delivering the critical financial services that support members' most important life goals. As a trusted partner in the communities it serves, Westerra continually seeks innovative solutions to meet members' needs. Recently, they sought a knowledgeable advisory partner who could help deliver on those ambitions.

Since 2023, Westerra has relied on SRM for trusted counsel and strategy, leveraging SRM's comprehensive support to evolve the organization's approach to operational excellence.

### SRM's Work in Summary:

- Contact Center as a Service (CCaaS) market assessment, including detailed business and data requirements through the leading of effective client workshops and RFP management.
- Supported all vendor presentations and demos, while providing observations of each vendor to help the credit union select its preferred CCaaS partner.
- Tailored the RFP and vendor selection approach to Westerra's strategic goals, unique needs, and budget.
- Contract negotiation expertise delivered to help arrive at the most cost-effective and strategically aligned outcomes.
- Additional advisory and sourcing expertise that helped identify the changes Westerra would need to implement to maximize all the benefits of the new CCaaS platform.

### Background and Team

Westerra engaged SRM to provide strategic advice and solution expertise as it navigated a complex market to renew its present Contact Center platform which was approaching end of life. Having identified that they wished to upgrade to a cloud-based Contact Center as a Service (CCaaS) platform, SRM's team, led by Simon Rose from the company's European division, brought together industry knowledge, strategic sourcing experience, and a highly collaborative approach to deliver meaningful insights without straining internal resources or overstressing the budget, to lead the vendor selection process for the acquisition of a CCaaS platform that met their needs.

Project sponsorship came from Westerra's COO, Anneliese Elrod, whose partnership with SRM continues to drive positive momentum.

### The Impetus for Change

Westerra has an ambitious growth plan for the Credit Union and recognized that – as their present Contact Center platform was nearing end of life – they needed to rethink their approach to meeting member needs across sales, service, and back-office operations.

Anneliese's team had identified the direction they wished to proceed with, and given the need to manage BAU and their limited knowledge of the market, Westerra chose to enlist SRM's expertise to document their requirements, explore market options and vendors, and drive their tendering process. SRM partnered with the Credit Union to provide end-to-end support, actionable recommendations, and future-focused advisory aligned to Westerra's operational goals and member commitment. Additionally, SRM advised on the selection of Westerra's new CCaaS partner.

## What SRM Delivered



**End-to-End RFP Management:** SRM handled the entire RFP lifecycle for Westerra's call center initiative, ensuring rigorous evaluation of the market, documentation of the detailed business and data requirements that set vendor expectations, alignment of the project to the strategy, and running the end-to-end selection process through to contract negotiations, while minimizing disruption to staff and daily operations.



**Flexible Contractual Approach:** Understanding the importance of the existing budget for advisory support, SRM tailored its engagement to maximize value and insight through its experienced team, demonstrating a unique adaptability Westerra appreciated.



**Actionable CCaaS Strategy and Recommendations:** SRM provided clear recommendations and ready-to-implement plans designed to position Westerra for sustainable operational efficiency and growth via evolved Contact Center operations.



**Ongoing Advisory:** Beyond the RFP, SRM continues to support Westerra through contract negotiations and broader strategic projects in payments and technology.

## Trust That Extends Across the Organization

SRM's collaborative, responsive working style fostered genuine trust with Westerra's leadership team and project stakeholders. The partnership delivered not only immediate project value, but also established a foundation for long-term, enterprise-level collaboration.

## Outcomes

- A vendor selection process delivered on time and within budget.
- Recommendations to help optimize the credit union's readiness for the new Contact Center platform.
- Negotiated vendor contract, delivering significant savings for Westerra over the contract lifetime.
- Improved internal alignment and clarity for next steps, while leaving behind important knowledge for Westerra's team.

## About Westerra Credit Union

Westerra Credit Union is a Colorado-based, not-for-profit financial cooperative supporting members with the products, services, and guidance needed for a fulfilling life. They help their members believe in the future of their financial lives, using the mantra "You can do money." Learn more at [www.westerracu.com](http://www.westerracu.com).

## About SRM

SRM is an independent advisory firm focused on payments, sourcing, strategy, and technology, serving clients across the financial ecosystem. With 1,000+ successful partnerships, SRM brings trusted, unbiased expertise to every engagement. We activate what's next. Visit [srmcorp.com](http://srmcorp.com) to learn more.

