

# INTRO TO “MAX” - CCU’S DIGITAL ASSISTANT

When you call CCU, Max, our digital phone assistant will greet you. Max is trained to assist you with basic transactions and provide account information – any time, day or night.

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## WHY DO WE USE MAX?

At CCU, we know your time is valuable, so we strive to provide you with the most accurate, efficient, and personal service we can whenever you call in. Max acts as an additional set of hands by assisting members with basic account transactions or providing information on those accounts without the need to be placed on hold. This allows our contact support team representatives to help members with more complex requests that Max cannot assist with.

## WHAT CAN MAX DO?



CHECK ACCOUNT  
BALANCES



HELP YOU MAKE LOAN  
PAYMENTS



PROVIDE UP TO 30  
DAYS OF TRANSACTION  
HISTORY



DIRECTS YOU TO  
OTHER TEAM MEMBERS  
(REGULAR BUSINESS HOURS)

## BEST PRACTICES:

- When speaking with Max, use short phrases such as “Balance” or “Loan Payment”.
- Have your member number and Social Security number available. Max will ask you for this information to verify your identity.
- Please understand that Max is learning from every phone call to provide you with an even better experience in the future.