Rocky Mountain Credit Union Addresses Disparate Systems, Manual Processes with a Comprehensive Enterprise Content Management Strategy

COMPANY
Rocky Mountain CU

NUMBER OF BRANCHES
5

CHARTERED IN
1940

ASSET SIZE
$147 Million

MEMBERS
13,342

DATA PROCESSOR
Symitar Episys

For Rocky Mountain Credit Union (RMCU), 2011 marked a turning point toward integrated, reliable and efficient enterprise content management (ECM). The IT department spearheaded this entire process, from identifying the potential strategic benefits, through selecting Alogent as their technology partner, to becoming operational two years later.

Helena, MT-based RMCU was facing reliability challenges with its existing electronic document repository, compounded by proliferating manual systems and geographically-dispersed locations. The resulting fragmentation produced inefficiencies for both employees and members—a gap that needed to be addressed for the organization to fulfill its mission of building membership and member loyalty.

WE RECENTLY SAT DOWN WITH RMCU'S VICE PRESEIDENT OF IT, DEAN OLSEN, AND SYSTEMS ADMINISTRATOR JOE MORGAN, TO TALK ABOUT HOW ECM FITS INTO THE CREDIT UNION'S BUSINESS STRATEGY.

ALOGENT: What issues, related to documents and other content, was RMCU was dealing with in 2011 and 2012?

RMCU: Reliability and availability of the existing electronic system were a big problem. Documents that were scanned into the repository would disappear at times, and system downtime was too high. Employees compensated by keeping duplicate paper records and filing systems, which helped them do their jobs but worked against our strategic goals of member flexibility and enterprise efficiency. In addition, some departments, including our loan department, were still using almost entirely paper-based processes. So overall, we weren't making any progress toward being paperless.

The fact that some of our branches are an hour or two apart introduced additional layers of inefficiencies and delays due to physically transporting paper records. For example, if a member wanted to use different branches for signing loan documents, an employee had to drive the paperwork from one to the other. And scanning of common items such as signature cards and new member applications could take up to a week, including delivery from the branches to our central location.

What we needed was a solution that we could wrap around our existing workflows, and that could help us move toward being as paperless as possible.

A: You had a well-defined list of requirements for that solution, didn't you?

R: Yes, they were very specific, partly because we knew from experience what wasn't working, and partly because we engaged our end users from the beginning. Early in the planning stage, we established three priorities:

1. Symitar Episys compatibility. Integration had to be tested and proven.
2. Business operation and workflow efficiencies. Our processes were good, but the hosted legacy system was prone to errors in getting documents into the repository, and we needed a significantly higher availability level for users needing to access documents. We

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CREDIT UNION

felt we could accomplish this best with an in-house system that we could manage and control from end to end.

3. Long-term solution. We wanted a system that could grow and change with us and a technology partner we could work with for a long time.

A: How was Alogent identified as your technology partner??

R: We had already been successfully using [Alognet's] branch capture solution, ImagePoint Branch, through our CUSO for over 3 years. Branch capture is stable and easy to use, with no complaints from our users. Just as we were starting our vendor search in 2012, [Alogent] held two webinars, the first on the strategic benefits of ECM, and a follow-up showcasing FASTdocs 5, its ECM solution. We wanted to work with an industry leader in content management solutions, and we called [Alogent] later that summer when we started to evaluate systems.

What [Alogent] offered us is a step ahead of other vendors, with advanced features such as a member-centric filing system, which organizes our files in the way our end users access them. The system also provides multiple ways of getting content into the repository, including drag-and-drop, direct scan, and automated electronic import. These result in a reduced need for manual indexing—a significant gain in accuracy and productivity.

A: Credit unions often find data conversion from an older legacy system a barrier to adopting a new system, especially when some processes are still paper-intensive. How was this transition for you?

R: Overall, implementation and data migration went very smoothly, and was completed within our expected time frame. We opted to go live first with FASTdocs 5 in August, 2013. Electronic data migration began immediately afterward and took about three months, so we were able to take the legacy system offline by the first week of December. All new documents are going into the system now, and migration of paper files will be an ongoing process.

A: Now that the system is operational, how has ongoing support been, and more importantly, what are the results so far for your users and members?

R: Following completion of the initial system implementation, end user training, and a normal learning curve, reactions from end users have been good. Right now, we are capturing all automatically-generated content, such as ID cards, loan documents, account changes and membership applications. This is a welcome change for the entire credit union. For our loan department especially, it represents a big step forward. Documents are easy to find in the system as well, which is a win for our end users and for the department. Significantly, system availability is currently tracking at 98%.

[Alogent's] technical support team has been able to address everything we have asked of them. If the answer needs more research, they get back to us quickly. As IT professionals ourselves, we appreciate their procedures and their straightforward approach.

We plan to extend document capture of additional documents, such as drive-up receipts and balancing sheets, to the branches as soon as possible. We are confident that we selected a partner able to provide the tools we need for our future goals, and are happy to recommend [Alogent] and FASTdocs 5 to other credit unions.

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