

CASE STUDY

SymAdvisor™ Helps a Credit Union have a **Good GOODNIGHT**



Symitar®

Coastal Credit Union in Raleigh, North Carolina, knew it needed to increase efficiency in its GOODNIGHT processing. The extra-long duration of the operation was starting to cause difficulties. Marin Sawyer, Systems Manager at Coastal, describes the issue: "Nightly processing was running so long that it was beginning to affect business users each morning."

Activities that relied on nightly core extracts, such as Collections, Risk Management, and ARCU (Advanced Reporting for Credit Unions™) were affected. "We were running so close to the edge on processing that any change or issue during the night would cause a significant impact," says Sawyer. Some processing jobs failed because overnight operations took too long. There were also issues affecting after-hours phone support agents.

THE BENEFITS OF AN EXPERIENCED PROFESSIONAL

The credit union turned to SymAdvisor for help. "They would know the system better than anyone," Sawyer says, "and we love getting recommendations and finding ways to improve our processes."

Sarah Schreiber, Senior Systems Analyst at Coastal, says the SymAdvisor thoroughly reviewed the entire process from the start to finish. "There were a lot of moving parts to this and it's a little overwhelming. I didn't know how we'd get through it all. However, the SymAdvisor's process took the stress away. It was organized and made sense and took us from point A to point B to point C."

Schreiber wasn't sure what to expect before the advisor arrived but was pleasantly surprised. "Her knowledge and confidence in areas such as development, OpCon™, and system administration was impressive." Sawyer added: "She guided us through the whole process. She has a lot of experience and expertise."

In addition to suggestions for shrinking nightly processing time, the SymAdvisor demonstrated some navigation tips and tricks, including keyboard shortcuts. She also gave reminders about tools and documentation available on Symitar's *For Clients* portal (and where to find them). "Another tremendous benefit that we found from the SymAdvisor was employee training in GOODNIGHT and Episys® processing," says Sawyer. "Having System Administrators and System Analysts participate in the research and work under the guidance of the SymAdvisor significantly accelerated the learning curve for our group members who have relatively short tenure."

INSTITUTION

Coastal Credit Union

HEADQUARTERS

Raleigh, North Carolina

WEBSITE

www.coastal24.com

ASSETS

\$3.3 billion

MEMBERS

268,400

FOUNDED

1967



Marin Sawyer
Systems Manager
Coastal Credit Union



Sarah Schreiber
Senior Systems Analyst
Coastal Credit Union

MEASURING THE RESULTS

The engagement with SymAdvisor resulted in a two-hour reduction to its GOODNIGHT processing, which was a time savings of approximately 35% (from approximately six hours to four). This solved their problem.

With the processing time issue resolved, there was no need for an immediate upgrade to a new server. "All of these changes have helped us get the most use out of our Power 740 servers, which has saved Coastal significant money," says Sawyer. She said that the two most critical lessons learned were moving some jobs to back-up SYMs and purging files.

REVIEWING THE SYMADVISOR EXPERIENCE

Looking back on the engagement, Sawyer has a few takeaways and some advice for other credit unions. "It's important to make time for the project," she says. "We set aside dedicated time for the advisor to work with the team, and that was invaluable. Having the SymAdvisor onsite was very important and the reason we got so much accomplished." Sawyer said that this was the second time Coastal had used SymAdvisor, and an additional visit was planned for the future. "We've had nothing but positive experiences with SymAdvisors."

For more information about Symitar,
call **888-796-4827** or visit **symitar.com**.