Citadel Federal Credit Union Looks Toward the Future With Episys®

"Before converting to Episys, our credit union had been running on the same core system since the mid-1980s – a system that was not being invested in by our previous provider's Research and Development Department," said Jeff March, CEO at Citadel Federal Credit Union. Wanting to find a way to honor their Citadel Class Service Pledge of delivering superior banking products to its members, Citadel decided to begin a search for a new core system provider.

Brian Berry, Citadel CIO, reiterated, "Symitar's track record for investing in Episys is unparalleled. Symitar® is known for leading the way when it comes to making product enhancements – before you know you even need them."

EVALUATING EPISYS

"During our evaluation process, we looked at multiple alternatives because your core system is not something any credit union can afford to make the wrong decision on," said March. "We quickly narrowed our search down to Episys, and it was the referenceability of Symitar that sealed the deal."

Throughout the nearly 15-month evaluation process, Citadel spent a great deal of time meeting with their internal management team to determine what aspects of a new core system they consider to be the most important. The answer ultimately boiled down to two things: functionality and customer service.

"Any purchase of this magnitude should be looked at as a long-term commitment," added Berry. "In addition to Episys being the forward-thinking core system we were looking for, I really felt comfortable with the levels of customer service we received from the Symitar team. It was clear that they had our best interest at heart, and the wellbeing of our credit union was truly important to them. That speaks volumes."

Institution
Citadel Federal
Credit Union

Address
Eagleview Boulevard,
Exton, Pennsylvania 19341

Website
www.citadelbanking.com

Assets
$2.4 billion

Locations
19

Members
170,000

Founded
1937

**Symitar Software
Solutions & Services**
Episys®
Synapsys®
Synergy Enterprise Content
Management™ (ECM)
OpCon™
PowerOn®

Episys®

PROVEN CONVERSION PROCESS

Upon deciding to move forward with Episys, the next step was the conversion. "The conversion process was nothing but positive," said March. "The conversion team did a wonderful job of mapping everything out, and of making sure that the training and testing were both incredibly thorough."

When asked how Citadel's employees responded to the conversion, March admitted there was initial apprehension among the credit union's more long-term employees, but that getting them involved in the process helped assuage any fears of change. "Nearly one-third of our organization was directly involved in the conversion process, and being involved allowed for everyone to see hands-on how they were going to be affected at a granular level."

In addition to helping Citadel employees through the core transition, the credit union wanted to make sure their members would be minimally affected. "We needed the conversion process to go as smoothly as possible from a member's perspective," said Berry. "We felt confident that Symitar had a proven process in place, with great discipline around it."

TAKE ADVANTAGE OF COMPLEMENTARY SOLUTIONS

"When evaluating core systems, we not only looked at the core itself, but also at a number of complementary products and services that surround the core," said Berry. "We purchased Synapsys® to replace our internally grown CRM application; we installed Synergy Enterprise Content Management™ (ECM) in place of our previous document and COLD storage system; and upgraded our job scheduling solution to OpCon™."

The credit union also utilizes PowerOn®, Symitar's sophisticated utility which allows for virtually limitless customization of Episys. "PowerOn is an incredibly powerful tool – its capabilities are more extensive than we ever could have imagined," said Berry.

Speaking to the seamless integration of these complementary solutions, Berry said, "The decision to purchase Synapsys, Synergy ECM, and OpCon was an easy one to make because of the ease with which they integrated into our new Episys core. From a credit union's perspective, to have what we have, we're on the leading edge."

IMPROVED MEMBER SERVICE

"We have a strong growth philosophy here at Citadel, and the strategic plan to implement Episys will only strengthen our resolve," said Berry. "With Episys, our systems are much more workflow-driven and training is less cumbersome – combined, that means higher levels of speed and efficiency, translating to improved member service."

"It's a lot easier to train our front line in Episys, as opposed to in our previous core system, because Episys is intuitive," said Berry. "As we take on more volume, Episys adjusts. It enables us to grow without compromising member service."

For Citadel, the ability to look toward the future with a core system that they know will always be on the cutting edge of the latest technology affords them the opportunity to deliver the superior banking products they deem necessary to provide exemplary member service.

"When looking for a new core system, it's important to remember that you're not just committing to today, you're also committing to tomorrow," said Berry. "Things change very quickly in this business. Credit unions need a partner like Symitar who's willing to invest in the future."

For more information about Symitar®, or to schedule a demonstration or talk to an existing user, email **askus@symitar.com**, call **888-SYMITAR (796-4827)**, or visit **www.symitar.com**.

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