First Florida Credit Union Plans for the Future With Episys®

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Brent Lister, President and CEO
First Florida Credit Union

In a strategic effort to further enhance its products and services while improving the overall member experience, First Florida merged with similarly-sized State Employees Credit Union (SECU) in August of 2014.

According to Brent Lister, President and CEO, the credit union wanted Episys as its move-forward core system. The primary reasons were its flexibility, ability to integrate with complementary solutions, and Symitar's service reputation. Lister explains that when First Florida was seeking merger partners, it specifically sought credit unions that ran Episys. "In fact, prior to the merger, our Board of Directors voted that should anything go awry in the merger process, we were still going to convert to Episys," said Lister. "Episys is the direction we wanted to move in, no matter what."

THE CONVERSION PROCESS
"The conversion team did a wonderful job of easing the transition for us," said Lister. First Florida's conversion process took seven months, and involved not only converting its data to Episys, but also merging it with SECU's data. "The conversion team's programmers worked incredibly well with us in a very complex situation."

When it came to training their staff to use the new system, Lister said the two best training tools they had were time and resources. "We created subject matter experts in all of our departments across all of our branches," said Lister. "That, combined with the support of the Symitar staff, made a world of difference."

Institution
First Florida Credit Union

Address
500 W 1st Street,
Jacksonville, Florida
32202

Website
www.firstflorida.org

Assets
$716 million

Branches
13

Members
54,000

Founded
1937

Symitar Software Solutions & Services
Advanced Reporting for Credit Unions™ (ARCU), Card Processing Solutions™ (CPS), Episys®, NetTeller®

Episys®

EPISYS AS A THOUGHT-LEADER

"Any system is only as good as the resources put behind it," said Lister. "Symitar does that. They put the resources behind Episys so that it can serve the credit union marketplace as an innovative thought-leader." To successfully compete in today's financial industry, credit unions need to operate on a system that offers flexibility, scalability, and customization. "Having a core system that is flexible and adaptive to your needs – especially as your members' needs change – is critical for any credit union," said Lister.

Symitar's reputation for investing in Episys is unrivaled, especially as it pertains to creating new complementary products and making product enhancements. "Symitar just keeps innovating," said Lister. "We know that the future products and services that will come from Symitar are going to give us a huge competitive advantage."

SEAMLESS INTEGRATION OF COMPLEMENTARY SOLUTIONS

"Advanced Reporting for Credit Unions (ARCU) has been a brilliant tool," said Lister. "Consolidating reports and data in one place is much more efficient than relying on users to search multiple resources."

ARCU is a flexible data warehouse and reporting solution designed to meet the information requirements of Episys users. The database component incorporates Episys standard fields, transactions, calculated fields, tracking records, and key help files. It has been leveraged by First Florida to streamline back-office procedures, automating formerly manual tasks. "ARCU has been effective in allowing us to transfer information to our staff so that they can see where they are on their goals," continued Lister. "We believe that what gets measured gets accomplished, and ARCU helps us do that."

For their credit and debit processing needs, First Florida decided to implement Card Processing Solutions™ (CPS). "CPS lets us see transactions flow through the accounts on Episys, and our members can see it via NetTeller® on their online banking screens – instead of us having to use third-party payment systems," said Lister.

CPS is Symitar's comprehensive suite of payment processing solutions designed to include features like ATM, debit, and credit transaction processing; email alerts; anti-fraud text notifications; and loyalty awards programs. "Our staff loves the functionality of CPS," said Lister. "They have more control over getting information to our members in a timely manner."

RESHAPING THE INDUSTRY

For First Florida, the ability to plan for the future with a flexible and innovative core system gives them the opportunity to deliver the best possible member service.

"Episys is reshaping the financial services industry," said Lister. "The Symitar team that supports it is constantly innovating, and cares as much about investing in the future as it does providing a supportive partnership for the credit unions it works with."

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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