Quorum Federal Credit Union Speeds and Consolidates Operations with jhaEnterprise Workflow™

A successful credit union thrives on effectively managing change. Quorum Federal Credit Union, a full-service financial institution serving over 70,000 members in all 50 states, has taken advantage of every opportunity to increase efficiency and improve member service, resulting in one of its most successful years to date.

The Credit Union recently instituted a new method to optimize workflows – jhaEnterprise Workflow. Previously, it had used its CRM system for workflow management. Kevin Dono, Senior Director of Business Services, and Maureen Rohlfing, Junior Solutions Analyst, describe their use of Symitar’s product.

Did you adopt jhaEnterprise Workflow to solve a particular problem?
Kevin: The initial need came from the fact that the old CRM workflow system wasn’t a true workflow. You couldn’t create process maps or conditional elements, for example. jhaEnterprise Workflow has been a huge benefit and a platform for growth. It’s proven itself; we have found many uses for it.

Has it produced gains in efficiency?
Maureen: Yes. Users love being able to know who’s taking care of what process at any given time. They used to depend on email messages. Now everyone can see who’s got what task, and who’s done what.

Kevin: Because we’ve consolidated task tracking, we don’t have to look in several programs to see where tasks and activities stand. Having multiple functions in one work area helps with efficiencies. If a member goes online and fills out data on a form, it never has to be retyped. It goes from online banking to jhaEnterprise Workflow and into Episys®. The single data entry puts information directly into the core.

What business units within your organization have benefited from jhaEnterprise Workflow?
Maureen: Almost every department. The Call Center uses it. Lending uses it for automated reports. Operations gets a huge benefit with efficient handling of wires and check offers. Mortgage. Finance. It’s used across the entire organization from the CEO to temporary help. It’s definitely gotten organization-wide implementation.
How would you rate jhaEnterprise Workflow in terms of importance to your organization?
Kevin: I’d say it’s important and approaching mission critical. Many people on staff are still more familiar with manual methods, but as more employees get to know the product and what it does, it will become mission critical.

What features do you find most useful?
Maureen: People having the ability to see the work in front of them and know who’s doing what and what needs to be done.
Kevin: On the back end, the most useful feature is the ability to connect to and query any system. We can connect to any data source in the organization and create a sophisticated workflow that gets complexity away from the user and builds it into the back end.

How have your employees reacted to the introduction to jhaEnterprise Workflow?
Kevin: It’s one of the fastest adoptions we’ve had for a new system like this. We have constant requests for new workflows – requests for 10–15 workflows at any given time. The organization sees a lot of value in it.
Maureen: Currently, we have 123 active workflows and about 25 in production.

Would you recommend this product to other credit unions?
Kevin: I’d recommend not just jhaEnterprise Workflow, but the jXChange™ and SymXchange™ back end, especially if you have other Jack Henry products. This is the future of integration between multiple functions across the Credit Union. It brings together multiple products. There are many workflow options. The more you invest in it, the more you get out of it.
Maureen: The integration it provides is really great. We look forward to expanding it even more.

Is there anything else you’d like to tell us about jhaEnterprise Workflow?
Kevin: It’s a complex system to configure behind the scenes, but Jack Henry did a good job of making the workflow construction user-friendly. The drag-and-drop function makes it simpler. It’s easy to get started. You can tackle something as complicated and complex as you want.
Maureen: Support at Symitar® has been great. Very helpful. They’re getting to us quickly, and offering suggestions to make the product more user-friendly.