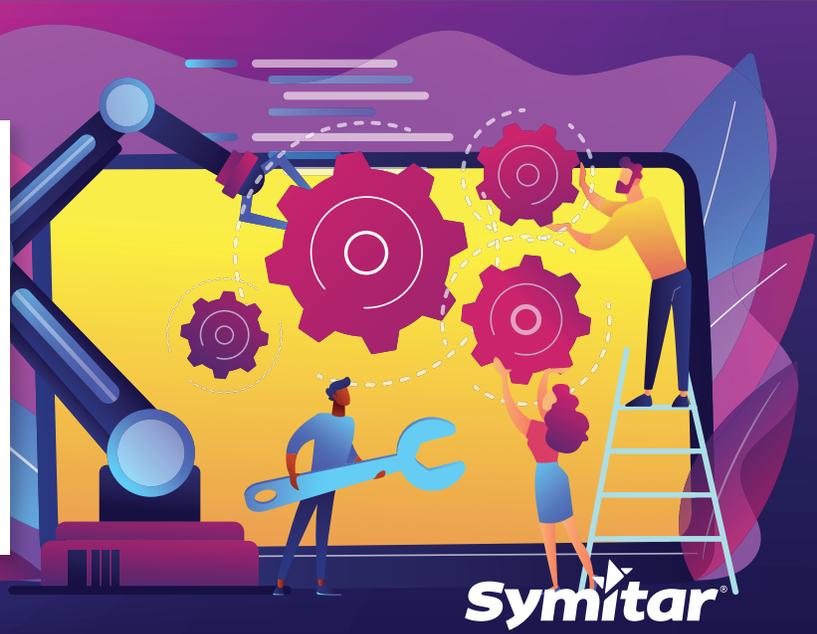


CASE STUDY

Automating Workflow at SELCO Community Credit Union



“The out-of-the-box deep integration with our core banking system is unparalleled in the workflow automation marketplace.”

- DARRIN MCLAUGHLIN, DIRECTOR OF STRATEGIC EXECUTION SELCO COMMUNITY CREDIT UNION

When Oregon-based SELCO Community Credit Union began using *jhaEnterprise Workflow™* to manage processes, there were significant increases in efficiency. Darrin McLaughlin, Director of Strategic Execution, describes how these changes came about.

SYM:

What issues were you looking to address with *jhaEnterprise Workflow*?

DARRIN: In 2014, we made a move away from our then current document management system. Synergy was one of the products we were considering. We also had the idea of workflow automation in mind, and that was part of our requirement. We had no system for workflow at the time. Instead we used our help desk ticketing system, expanded into other departments, and it wasn't efficient. We knew we'd need a better system in the future, and made that part of our planning.

In our selection process, we were down to two systems. The deciding factor was that Synergy integrated with *jhaEnterprise Workflow (EWF)*. The other product did not offer integration and would have had to attach a workflow piece to it. The deeper integration with EWF was a significant factor.

SYM:

What gains in efficiency has *jhaEnterprise Workflow* made to your organization?

DARRIN: The lack of error correction is a gain in efficiency we've gotten from using EWF. It's reduced the number of inputs and corrections. Data validation has prevented us from having to do back-replacing, and prevented us from introducing bad data. We also gained the opportunity to move tasks to folks with excess capacity.

By streamlining operations, EWF reduces email alerts, phone calls, and other interruptions. Now we only alert you when it's your turn to do your part of a particular task. Employees don't have to check back several times to see if their tasks are ready to be completed. Doing things in the right order and only one time – it's very efficient.

Workflow automation has also given us increased visibility into the volume of work that occurs on a daily basis. Now all team members can look at a work queue. If someone is out of the office, it's easy for another person to see what needs to be done and provide back up. There are no single points of failure and we have continuity of business.

INSTITUTION

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Credit Union

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Eugene, OR 97401

TELEPHONE

800-445-4483

WEBSITE

www.selco.org

ASSETS

\$1.4 Billion

MEMBERS

128,000

FOUNDED

1936

**SYMITAR SOFTWARE
SOLUTIONS**

jhaEnterprise Workflow™

SYM:

Can you provide a rough estimate of dollars or hours saved on a monthly basis with *jhaEnterprise Workflow*?

DARRIN: In accounts payable, we did measure the process time. With EWF, managers are now reminded daily of approvals required by accounting, and they act more quickly. Where it once took 21 days for an invoice to work its way through the process, it's now four days. Overall, there's efficiency in not having loose documents scattered around, getting lost or accidentally recycled.

It's hard to put a dollar or hour amount on this. If I had to guess, I'd say we are saving between 100-140 hours per month. That's with eight workflows. Ultimately, we'll likely save more than 250 -300 hours per month. But the real value is in eliminating paper, manual processes, failure points, and data entry errors.

SYM:

What business units within your organization have benefited from *jhaEnterprise Workflow*?

DARRIN: It improves processes within accounts payable (which hits every department, because there are invoices for every business unit), as well as legal, accounting, operations support, lending administration, and executive administration.

SYM:

How would you rate this product in terms of importance to your organization?

DARRIN: It's somewhere between important and mission critical. We have changed processes enough that we've forgotten how we did it before. Affidavit support, subpoena gathering, accounts payable – they all depend on it.

SYM:

What features do you find most useful?

DARRIN: Integration with document management system and core banking – those two are the fundamentals. We can now do things that other workflow systems simply wouldn't allow. Also, the notifications, approvals, and process automation – these all form the backbone of how it works.

SYM:

If you would recommend this solution to other credit unions, what is the most compelling statement you would make?

DARRIN: The out-of-the-box deep integration with our core banking system is unparalleled in the workflow automation marketplace.

The document management integration is also without parallel in the marketplace. The others don't offer this out-of-the-box system-to-system integration. Other vendors wanted to build an API or some type of add-on.

I should add that user adoption has been very high considering the changes that our EWF implementation brought to the credit union. That was beyond my expectation. We've seen advocacy and evangelizing among users instead of resistance.

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