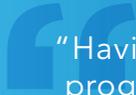


CASE STUDY

SymAdvisor™ Provides Solutions and Education for The Focus Federal Credit Union



“Having my IT group learn the proper way to program PowerOn scripts was priceless.”

- LISA ADAMIAK, VICE PRESIDENT AND CFO,
THE FOCUS FEDERAL CREDIT UNION

SOME ISSUES TO RESOLVE

An Oklahoma City credit union needed to bring a new IT programmer up to speed. However, the programming documentation left behind by his predecessor was either non-existent or not sufficient. The new hire also needed training on Episys®-specific coding. Lisa Adamiak, Vice President and CFO of The Focus Federal Credit Union put it this way: “We were struggling in IT because we didn’t know why something was done in a given way.”

“We needed to fast-track the new programmer’s knowledge on the backend of Symitar operations,” Lisa said. The credit union decided that some concentrated on-the-job learning would be a good idea. That’s when they turned to SymAdvisor. The idea was to accomplish two tasks at once by having a SymAdvisor solve some IT issues while the IT staff watched and learned from him.

An issue The Focus FCU needed to solve was that some software processes had been set up in a way that could pose problems later. For example, Lisa mentioned that joint accounts had been created in a way that made it difficult for third-party providers to work with them. “We needed to make a list of things like this to be retrofitted.” said Lisa. “Open architecture allows you get the same result a hundred different ways,” she added. That meant that the credit union needed to not only resolve problems but select specific methods of accomplishing tasks and then document them.

THE ADVISOR IN ACTION

With this goal in mind, Lisa had a clear idea about how they could use SymAdvisor. She didn’t want or need a survey of all the things that might be improved in their core operations. “We needed someone who could program and show us how to do it.” That is exactly what they did with a Courtesy Pay problem. “All of our new checking accounts that weren’t hand-entered were not

INSTITUTION

The Focus Federal
Credit Union

HEADQUARTERS

Oklahoma City, OK

WEBSITE

focusok.com

ASSETS

\$113,070,000

MEMBERS

11,172



Lisa Adamiak
Vice President / CFO
The Focus Federal Credit Union

THE ADVISOR IN ACTION (CONTINUED)

getting Courtesy Pay," she explained. "We were able to have the SymAdvisor fix that while he was here, and we learned from what he did."

Another task was looking at PowerOn® customizations that were no longer working. "Having my IT group learn the proper way to program PowerOn scripts was priceless," Lisa said. "It is so much cleaner and easier now. The next person can pick it up and move forward."

The credit union worked with the SymAdvisor to address other priority issues. Lisa described the SymAdvisor as "Pretty amazing at figuring things out, and he led us down some pathways to figure them out ourselves. It clarified our understanding of system processes." Lisa added that the SymAdvisor understood their processes because he'd worked in a credit union before and there was a huge value in that.

WORTH THE INVESTMENT

The watch-and-learn approach proved beneficial for the credit union. "It was exhilarating and exhausting at the same time," said Lisa, "and it produced some rewards. Everybody felt it was worth the money. I'd say we got more than our money's worth. We came away with skills and success factors moving forward. We're considering another SymAdvisor engagement. The value is high for us." She added that it gave her peace of mind knowing that the current IT staff was now programming and documenting in an appropriate way.

What would Lisa say to other credit unions considering SymAdvisor? "My biggest recommendation would be to really prioritize your wish list before the engagement and stick to your list. Don't go off on a tangent. Hit the high-priority issues."

The Focus FCU found using SymAdvisor an enjoyable experience. "He [the SymAdvisor] is such a nice guy. He's fun and personable," Lisa said. "He never made us feel foolish. We loved working with him." After the engagement, the advisor provided a brief but thorough report. "He summarized three things," said Lisa. "What we completed, the next steps, and things we put in a 'parking lot' for another time. That gave us a nice roadmap for the IT department."

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