TruWest Credit Union

Cut costs, increased service with OpCon

Daily Repetitive, Manual Tasks

"Pretty much everything we did was manual, with the exception of only the simplest jobs," said Bryan Catlett, Application Engineer II at TruWest Credit Union. It finally became clear that TruWest needed an automation solution. "We had three staff members staggered into shifts to run all these manual tasks," said Catlett.

Catlett first looked at a product designed for the credit union's core platform, installed and even tested this product. This solution worked fine with the core, but it wasn't able to interact with other systems outside the core. "I also evaluated OpCon and determined that it was much more future-proof and expandable," Catlett added.

A Scottsdale, Arizona based credit union with branches across Arizona and Texas.

- Fiserv XP2
- 210 Employees
- Over $893,000 million in assets
- More than 67,000 members

CHALLENGE	SOLUTION	BENEFITS
Current product had limited abilities and could not interact with other systems	OpCon's operations offer multiple options and interact with other systems	50 percent of all processes automated and a $2,000 per month in savings from error reduction
Multiple staff members had to run daily manual tasks	OpCon was able to automate daily tasks within 6 weeks	OpCon saved the company 18 man-hours per day
The company had a seven-page run sheet	OpCon not only automated IT related tasks, but manual tasks from several other departments	93 percent reduction in run sheet

"Our run sheet is now at half a page. What's more, every new task that comes up is evaluated for automation. I'd estimate that at least 50-percent of all new processes can be fully automated."

Bryan Catlett, Application Engineer II

Success From the Start

"We started automating simple tasks that first week and getting a good foundation for everything else that needed to be done," said Catlett. "After that first week, we started looking over our run sheet and went after the most complicated procedures on that list," he continued. "We got about half of our original run sheet automated in the first five weeks."

> "The support and level of expertise from SMA is the best that I've seen."

Bryan Catlett, Application Engineer II

The results were impressive. "Basically, within a six-week period, we went from a seven-page run sheet to a two-page run sheet," said Catlett. "Our run sheet is now at half a page. What's more, every new task that comes up is evaluated for automation. I'd estimate that at least 50 percent of all new processes can be fully automated."
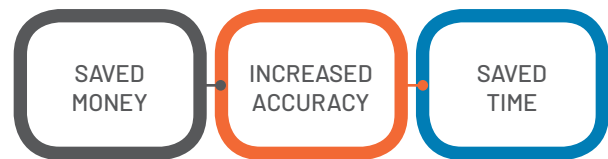
A Substantial ROI

"At this point, OpCon saves the IT department 10 man-hours per day," said Catlett. "When you factor in all the processes we've automated for other departments, it saves the credit union another eight man-hours per day."

"When I did the original cost-benefit analysis for OpCon, I estimated a 20-percent cost for the time correcting errors, which has now been completely eliminated," said Catlett. Catlett estimated that OpCon saves TruWest an additional $2,000 per month in eliminated errors.

"Of course, it all depends on your size and how fully you deploy OpCon," said Catlett. Catlett went on to explain that any credit union could expect to save about 6,500 hours each year by eliminating manual tasks.

Support Is Key

"Support is paramount for a product like OpCon because it's so important to our operation," said Catlett. "The support and level of expertise from SMA Solution is the best that I've seen." According to Catlett, that's rare among vendors.

SAVED MONEY — INCREASED ACCURACY — SAVED TIME

"There are only two vendors I've ever dealt with that have delivered 100-percent satisfaction, and SMA Solutions is one of them," he concluded. "SMA Solutions' reputation for great service is one of the reasons we chose OpCon."