

1st United Credit Union

Unprecedented levels of automation with OpCon

From Manual Processes to Customized Automation

1st United Credit Union had been running its previous scheduler for more than four years, but wasn't seeing the results that the credit union had hoped for and expected. What's more, according to Lori Hernandez, the credit union's Director of Information Services, the provider of that scheduler offered little, if any, help.

"We didn't have any dependencies configured because we didn't know how to set them up," said Hernandez, "and we couldn't get any guidance on that from the software provider." She said this was just one example of the ongoing lack of support and training that the credit union experienced while attempting to use that prior product.



Founded in 1932, 1st United Services was one of the first credit unions in the state of California.

- Fiserv-XP2
- 200 Employees
- \$956M Asset Size
- 50,000 Members
- 10 Branches

CHALLENGE	SOLUTION	BENEFITS
No dependencies configured in prior scheduler	OpCon™ dependencies are easy to configure across all platforms	1st United Services CU is able to automate new processes quickly and easily
Training and support from previous was virtually nonexistent	SMA Technologies provides comprehensive onsite training and consulting	The credit union's employees are now comfortable using OpCon and understand its many capabilities
Manual processing led to accuracy issues	OpCon eliminates manual keystrokes and the accuracy issues they create	The credit union enjoys significantly improved accuracy, which saves even more time and money

"The beautiful thing about OpCon is that it can automate everything. We couldn't do that with our previous product."

Lori Hernandez, Director of Information Services

"Some of the things we wanted to do may have been possible," she added, "but we simply couldn't get any answers." She finally had enough and decided it was time to shop for a new workload automation solution. However, she only looked at one product: OpCon, from SMA Technologies.

"To tell you the truth, I'm honestly blown away by everything OpCon can do. I absolutely love it!"

Lori Hernandez, Director of Information Services

"We only looked at OpCon because we were familiar with SMA Technologies' reputation," said Hernandez. "Credit unions are very open about sharing information, and we had heard nothing but good things about SMA Technologies. We knew what we wanted from the start."

According to Hernandez, the difference in service levels between SMA Technologies and the previous provider was like night and day. Where the previous company provided no training to speak of, OpCon training was comprehensive, yet easy to understand. Where the previous company showed little interest in the credit union's ongoing success, a seasoned SMA Technologies analyst came onsite to thoroughly discuss and understand the credit union's environment in order to develop a customized automation plan.

"We definitely were not trying to replicate what we were doing with the previous product," said Hernandez, "because we knew it didn't represent a best-practices approach."

Productivity and Accuracy on the Rise

"All of our manual processing is pretty much gone," said Hernandez. "I've already freed up almost an entire person, and we're not done automating yet." She added that freeing up these resources has allowed her department to transform into a more strategic, rather than reactive, organization. "We need to be able to do more and OpCon will enable that," she added. Likewise, she's enthusiastic about the improved accuracy inherent in deploying OpCon.



"Because we've taken out that human/typing component from so many jobs, our accuracy has gone through the roof," said Hernandez. "For example, we set up Self Service tools for our electronic services department because they used to have to type directly into our console. Now the potential for human error has been eliminated." "With technology, you'll always need people," she added, "but with OpCon, our people will be able to do so much more."