

Frandsen Bank & Trust

Improving risk management and reducing expenses with OpCon

Condensing Workflows to Enhance Efficiency

Frandsen Bank & Trust relies on several operating systems to manage its day-to-day IT operations. Before installing SMA Technologies' OpCon, the IT staff had written several scripts and workflows that ran on multiple servers in many different scripting languages. The large number of workflows became unmanageable over time, especially when attempting to process exceptions and troubleshoot unexpected issues. David Buggeln, Director of Information Systems, said that from the very first one-hour sales call with SMA Technologies, the stakeholders at the bank, the CEO and IT staff understood what OpCon could do for them.

FRANSDEN BANK & TRUST



Based in Minnesota, Frandsen Bank provides insurance, banking, investment and wealth management and trust services.

- Fiserv Premier
- \$1.6 billion in member assets
- \$142 million in wealth management and trust assets
- 31 branches across North Dakota, Minnesota and Wisconsin

CHALLENGE	SOLUTION	BENEFITS
Managing multiple processes and scheduling frequencies was complicated because of irregularities	OpCon™ dependencies are easy to configure across all platforms	OpCon's event-based workload automation allows for irregular processes, which is reducing the risk of manual errors
A competitor's ACH solution required an employee to balance Fed files manually	SMA Technologies provides comprehensive onsite training and consulting	Automation of ACH payment files enables the IT staff to focus on other tasks
SQL backup and maintenance plan verification was one of the most expensive managed services	OpCon eliminates manual keystrokes and the accuracy issues they create	OpCon reduces the need to manage services and increases productivity and efficiency in other areas

"It became apparent very quickly that the SMA Technologies product, through a single pane, if you will, could explain everything it's doing across multiple operating systems, different programming languages and different departments," Buggeln said.

Taking Scheduling a Step Further

Frandsen Bank & Trust favored OpCon over competing products in part because the software was more than just an automation solution. For example, Buggeln said, a competing vendor's ACH balancing tool still required a bank employee to balance fed files to those loaded onto the core system.

"From the very first one-hour sales call everyone from the stakeholders at the bank, to the CEO and the IT staff understood what OpCon could do for them."

Dave Buggeln, Director of Information Systems

OpCon automated that process by providing tools to automatically check and compare balances. This had a dramatic impact on both efficiency and accuracy.

"We really felt that OpCon was going to that deeper layer to automate the things that are truly a concern to us," he said. "We can script and schedule all day long, but we needed a proven tool that will go that extra step and actually automate those processes." The bank has deployed the OpCon Microsoft SQL integration with the expectation that the effort will reduce its annual managed services expenses by 75 percent.

One of the bank's largest managed services expenses in the SQL environment is backup and maintenance plan verification. The OpCon Microsoft SQL integration can automate those routine processes and only notify the bank when and where it finds exceptions, reducing the bank's need for managed services.

Automation Tool Selection Advice

For institutions considering implementing workload automation in their environments, Buggeln recommends first defining exactly what is expected from the automation solution. Frandsen Bank & Trust issued a very detailed request for proposal (RFP). Buggeln said the organization was very impressed by the detailed response it received to its RFP from SMA Solutions.

"These guys really like to get into the guts of things," Buggeln recalled.



"If you want to do scheduling, there are many schedulers available and there's a million scripts you can write in a million different languages," Buggeln said. "But if you want to automate and really have a hands-free approach to your operation that your entire staff can get behind, you need to take a close look at what vendor can deliver the total package and verify that vendor has a track record with like-minded peers. On the backend, you really need to have a commitment to learning the capabilities of your automation software and moving as many of your operational routines into that platform as possible."