WESCOM
Resources Group

Park◆◆View
FEDERAL CREDIT UNION

CASE STUDY

PARK VIEW FEDERAL CREDIT UNION IMPROVES EFFICIENCY WITH UNITRI SERVICE BUREAU

BACKGROUND

Park View Federal Credit Union is based in Harrisonburg, VA and serves nearly 11,000 members through five branch locations. Founded in 1969 to serve the local Mennonite community, Park View's field of membership now includes all Christian churches in Harrisonburg and Rockingham County, along with numerous select employee groups, colleges, and schools.

Park View went live with Wescom Resources Group's UNITRI Service Bureau in July 2017.

CHALLENGES

A Diverse, Young Membership: Boasting a median member age well below industry average, Park View sought to expand its digital offerings to better serve its millennial and Gen Y members.

Stringent Disaster Recovery Requirements: Park View was challenged to cost-effectively meet the NCUA's requirement to maintain geographically-dispersed backup servers for business continuity. The Credit Union also needed an efficient process for conducting regular DR testing.

Costly Operational Inefficiencies: To achieve its strategic goals, Park View needed to increase efficiency, reduce costs, and redeploy some back-office staff.

Maximize Productivity: The Credit Union's operational staff wasted significant time on tedious, rote processing tasks. Park View wanted to unleash its talented team on strategic, member-focused initiatives and problem-solving.

THE SOLUTION

When Park View decided to convert its core system to Corelation Keystone in 2017, it had a choice: the Credit Union could maintain its hardware in-house, or transition to an outsourced service bureau model.

"We looked at the costs of purchasing new in-house servers and installing redundant servers elsewhere as our backup solution," says Pam Martin, Director of IT. "We quickly realized that service bureau was the way to go."

Several key factors led to Park View's decision to select the UNITRI solution, including WRG's fundamental redundancy built into its main office in California coupled with a backup site in Arizona, its well-developed DR testing process, and a well-earned reputation for outstanding client service.

"Once we sat down and considered the positives and negatives," Martin adds, "WRG was the obvious choice."

> " *Our expectations for implementation were exceeded.* WRG's experts knew what they were doing and walked us through the process. One of Park View's core values is to make it easy for your members, and WRG makes it easy. How we want to work with our members, WRG does that for us. "

PAM MARTIN
Director of IT

THE RESULTS

Time Savings: Switching to UNITRI Service Bureau has enabled Park View to eliminate many manual daily tasks, such as downloading ACH and share draft files from the Fed and importing them into the core.

"In addition to a significant cost savings, we're saving at least one hour a day that would have been spent on manually transferring files," says Tanya Holland, Director of Operations. *"It allows our team to focus on the more complex tasks and problems."*

"WRG allows our operations department to work with a leaner staff."

TANYA HOLLAND
Director of Operations

Automated Reporting: WRG has enabled Park View to automate over a dozen daily reports it imports into the core system, including critical third-party vendor reporting.

"We have entirely automated our end-of-month member statement processing," Holland says. *"Anything related to file transfers no longer takes employee time, and we have moved to a fully-automated process."*

Improved System Uptime: Since moving its backup servers to UNITRI, Park View has experienced minimal downtime.

"WRG has been very reliable," Martin says. *"Our uptime has been great, and we are very happy with that."*

Improved Disaster Preparedness: UNITRI Service Bureau clients host their core and ancillary systems in WRG's data center. Each year, WRG assists each client in performing a multi-vendor, multi-point system failover simulation. Credit unions like Park View can rest easy knowing they can execute their BCP plan smoothly under the most trying circumstances.

"We've done three disaster recovery tests with WRG, and they've all been very easy and very successful," Martin says. *"Previously, even figuring out what to do and how to do it was so time consuming. WRG has integrations with our critical vendors, and they handle the connectivity aspect seamlessly."*

"We have added two programmers to our staff because we now have the tools to do really great, powerful things, and the time to invest in that as well."

TANYA HOLLAND, Director of Operations

Re-Energized Staff: Park View has reduced its full-time equivalent back office and operations staff from seven to four, largely due to the UNITRI implementation.

"It's been huge for our operations department," Holland says. *"The combination of the new core and WRG allowed us to transition certain positions to completely new jobs at the Credit Union."*

Introduce New Products: Through WRG's deep third-party integrations, Park View can offer new services, like Fiserv WireXchange and online account opening, to its young, tech-savvy membership.

"We used to spend a lot of time managing and updating our hardware, servers, and network, and keeping it stable," Holland says. *"With WRG, we are now using that time and energy to focus on expanding our offerings and moving the Credit Union forward."*

A True Partnership: One unexpected benefit of moving to the service bureau model has been WRG's role as a trusted partner.

"You don't feel like a client; you really feel like a partner with WRG," Holland says. *"They've recently added some development services, and it's exciting to know that they're continuing to look at ways they can serve their base."*

"I didn't expect it to be such a partnership. We brought on more than half a dozen new vendor relationships the summer of our core conversion. WRG has really risen to the top."

TANYA HOLLAND, Director of Operations

WHAT'S YOUR STORY?

Park View Federal Credit Union's success with WRG speaks for itself. But your story hasn't been written yet! Contact us today to begin your journey with WRG.

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