

Core Systems: Getting Upgrades and Conversions Right

Every upgrade or conversion requires a lot of attention to detail and must be taken seriously. In fact, we treat internal upgrades and conversions from different systems exactly the same. Every credit union is different in their procedures and operations which means that the planning and training must be customized for each one. It is critical to get staff and management buy-in early in the process to make sure that everyone is prepared to move forward with the new system.

There are so many reasons to move up to newer, open Windows-based systems today that credit union senior managers are seeing the benefits, and are not as leery today about upgrading or converting as they have been in the past. Technologies like imaging and loan decisioning are now available to even the smallest credit unions with the modern systems. However, while we always encourage our legacy clients to move to our flagship Core Processing platform; FORZA³™, we do not pressure them or even place a sunset date on our IBM AS400 based system that has been working well for them for many years.

Once a credit union has chosen to go with our FORZA³™ platform, we assign a dedicated conversion coordinator who has years of experience. The coordinator sits down with the credit union and goes over their operations – daily, monthly, and year end – from start to finish to understand their complete operation. The goal is to make everyone aware of common oversights and all of the features and benefits of the new system. Not only will the new system be different, but it will offer better functionality and will help them run their credit union much more efficiently.

Because we use an open database (Microsoft SQL Server), our clients enjoy easy access to their data via Crystal Reports. We want to make it as easy as possible for our customers to pull reports and get the information that they need. Even though we also provide a full line of integrated add-on modules, all the core functions of FORZA³™ are easily accessible by other products. Our conversion coordinator pays close attention to these details and our team works closely with other vendors to ensure that all of the systems integrate properly.

At Enhanced Software Products Inc.(ESP), we have worked hard over the past ten years to build our customer base and we rely almost exclusively on word of mouth advertising. We know that it is a lot of hard work to convert core systems because they are the 'nerve center' of the credit union, but we are convinced that the long term benefits far outweigh the short term efforts. Our comprehensive Core Solutions, which are matched to a robust suite of ancillary products and backed by excellent customer service and support, make for a great solution for the smallest credit union of just a few hundred thousand in assets up to larger credit unions with hundreds of millions in assets.



Matt Lefler is Director of Sales at Enhanced Software Products, Inc. (ESP). Matt is part of a management team that is a balanced group of both technology and Credit Union industry professionals because we believe that a pure technology approach often loses its focus on the business it is supposed to be servicing. For almost 10 years, ESP has focused on redefining the standard high tech company model. Our initial product was acquired in 1996 from a very large publicly held company. Within 6 months, customers were not only happy but also ready to act as references for ESP. As a privately held company, ESP has been able to focus on what we feel is important to our customers while many public companies are focused on meeting stockholder expectations. ESP is growing steadily - not through merger and acquisition, but through pure quality and performance.