

CORE SYSTEMS - DEPLOYING NEW FEATURES/FUNCTIONALITY EFFECTIVELY

Getting the most out of a core system is a frequent concern on the part of both the credit union and the DP vendor and it leads to our company mission - *personalizing technology*. At SOSystems, we have truly endeavored to *walk the talk* by priding ourselves on a rich technology delivery designed to more personally meet the needs of the credit union.

For several years we were told two things: core systems need to be easy to use and secondly, we need to get at our data. We became sensitized to hearing: "It's not *what's* in the system, for the most part, it's more than enough functionality, but rather, *how to best use it and put the data to work.*"

As a result, we commenced an entire system rewrite six years ago with the final phase nearing completion and beta within the next twelve months. The system is now in a familiar and friendly browser format while data is entirely processed and stored in an open, relational and non-proprietary layout.

With all that said, we've learned that features and functionality are crucial but servicing the credit union, indeed, getting into their issues and feeling their pain, indeed, *Technological Empathy* is a greater priority.

We've come to know that the three most important means by which we can better our relationship with our credit union partners, in ascending order, are: 1) Documentation; 2) Training and on-site assistance; 3) Accessibility.

Up to date and easy to follow documentation is an on-going challenge. As often as we deploy new technology - which is constantly, we need to provide good documentation to support it. We place documentation on the website, our case support tool, we provide CD copies at User's Meetings and we embed related documentation through our Help command within each module.

On site training is very effective and we usually dedicate a week to each credit union following an upgrade or conversion to a new technology revision. A consulting staff stands ready to support nearly any credit union technology need as well. We've found a week per month contracted over the course of a year, for example, binds the credit union and SOSystems and keeps the system running at peak performance. WebEx training has proven effective and convenient as well but *sitting in the trenches* is an invaluable education for the DP vendor.

The most important requirement for the credit union and SOSystems is an open, effective communication conduit that ensures a meaningful, two way partnership. We've examined our touch points and have made adjustments. For example, we make sure there is a live voice on the other end of every call, no matter what the nature of the call might be. Each technical case is *owned* by a Technical Support Representative and followed through to resolution. In addition, we have employed half of the SOSystems work force to personally advocate a group of credit unions, assigned to them on permanent basis. Each SOSystems advocate is tasked first and foremost to champion the cause of *his or her* credit union. This includes at least a monthly call or visit to personally assure that the IS needs and credit union CEO are happy with the system. For over 18 months now, this program has proven essential for the deepening relationships we require at SOSystems with our credit union partners.

Credit Union technology requirement and the systems designed to meet them have never been more complex. SOSystems delivers a top quality solution with personalization stemming from every transaction. At the end of the day, however, service, care and standing behind a genuine partnership prevails.



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