

Core Systems: Getting Upgrades and Conversions Right

When conversions and upgrades are run as projects from start to finish, they do not have to be frightening. In fact, they can be liberating in the sense that the employees have a great opportunity to learn new things and improve their processes and operations. So much depends on end-to-end planning, careful scheduling, and keeping the lines of communication open.

Members' needs are changing and the marketplace is constantly evolving, which means that the credit union really needs a data processing system that is flexible. The credit union should run their business the way that they want to – not the way that their software determines how they can operate. They need a system that meets their needs not only today, but going forward with features and functionality that they may not have even thought of yet.

At XP Systems, we have decades of experience with upgrades and conversions and we have assembled a team of conversion programmers, trainers, technical support specialists, and project managers who are prepared to spend six months to a year on a project. We make sure that we talk to everyone at the credit union about how the project will move forward and all of the critical milestones along the way. This helps instill confidence that we are all working together and that we are in this project together. We don't view our credit unions as customers, we see them as our business partners – we are in this together and we are all responsible for our mutual success.

Once the conversion is underway, we hold weekly internal staff meetings with all of our employees at XP Systems who are involved in the project. We go over every detail and the project plan progress to ensure that we are on track. There is also a weekly meeting with the credit union personnel to make sure that they are moving forward. We recognize that the credit union employees still have their regular jobs to do on a daily basis, so we make sure to build allowances for this into the conversion schedule. Another unique feature that we have is to include a theme for the conversion project, which really helps make it fun and includes rewards for reaching key milestones. Finally, we do all of the training on converted databases, and do this multiple times before the "live weekend."

A conversion is a perfect time to look at process improvements and explore ways to gain new efficiencies with our new XP2 solution. Our project managers and trainers spend a lot of time working with the credit union in this area and showing them all of the power and flexibility that XP2 offers. Our goal is to use XP2's standard and special features to tailor our system to the credit union's specific needs. At the end of any conversion or upgrade, we consider it a success when we help our credit union business partners to better serve their members.



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Janet Wall is Senior Vice President of Customer Services at XP Systems, a unit of Fiserv, Inc. Janet Wall joined XP Systems in 1996 to manage the areas of customer installations, education, customer support and documentation. She has over twenty-years experience in the financial services industry. Janet can be reached at 866-505-9100, or janet.wall@xpsystems.com. XP Systems is headquartered in Moorpark, California and has over 230 employees and 14 regional offices. XP Systems' customers are 300 credit unions throughout the United States and Guam. These credit unions hold combined assets of over \$70 billion and represent 8.5 million members.

