



## Teamwork Pays Big Dividends in Success of Conversion Weekend for Vermont State Employees Credit Union Migration to Open Solutions Technology



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### The Setting:

Guiding principles of cooperation, teamwork and reliance that defined the Vermont State Employees Credit Union when it formed in 1947 are still key ingredients for its success today. For nearly 60 years, credit union employees have focused their efforts to serve members and help them reach their financial goals.

While the cooperative premise of the credit union idea is a financial one: people pooling money to make loans to each other and returning profits through member dividends and benefits, an inside peek into how this credit union tackled its migration from a legacy-based system to the open architecture of Open Solutions technology, shows how much employee cooperation and teamwork can mean to the success of a monumental transition.

"After 17 years on one legacy-based system, I believed this was going to be a profound change in how we operated," said Steve Post, CEO of Vermont State Employees Credit Union. "We looked hard at the technical environment and wanted to place our system on a platform we could manage in the future. From day one, I thought it was essential that everyone touch the project and get engaged in it. I also wanted to give all 125 employees a high level of confidence that the information on the new system would be good information, and that they wouldn't be responding to members suddenly noticing inaccuracies."

### Addressing the Challenge:

While the credit union's "our focus is you" philosophy is directed toward its members, the cooperative effort of people working together to help one another succeed has a strong hold on internal operations as well. "If I were to list the three most important things we did to have a successful conversion," Post reflected, "they would be:

1. We made it the single highest priority of our organization.
2. We involved as many people in the organization as possible in the process.
3. We owned the process.

Even though Open Solutions was supportive throughout and on-site during the migration, we viewed it as *our* conversion. Each team leader understood it was our ultimate responsibility."

Shifting from one system platform to another is a heady undertaking. But approaching the challenge with humor and a solid game plan eased the tension and built confidence throughout the organization.

Vermont State Employees Credit Union dubbed their migration project "The Matrix Evolution." Teams put in place to tackle the primary components were named for historic pioneers related to their task:

1. Team Leonardo (named after Leonardo da Vinci) – responsible for dealing with technical changes and challenges



Steve Post, CEO  
Vermont State Employees  
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2. Charlie Company (named after Charles Darwin) – responsible for conversion management to make a smooth transition when evolving from one platform to another
3. Polo Club (named after Marco Polo) – responsible for discovering new features of the platforms being put into place

The conversion group consisted of 44 people, nearly one-third of the organization's workforce, clustered into 12 sub-teams that held primary responsibility for implementing all the different platforms the credit union had acquired. To realize the benefit of a comprehensive organizational perspective and to give everyone a better understanding of everyone else's job, teams were purposely formed with cross-departmental representation.

"We invested a lot of resources to ensure the integrity and accuracy of our data," explained Steve Koenemann, the credit union's chief information officer. "Our data integrity team reviewed a ton of information, comparing paper form to electronic form. They went through the entire member database to give our information the highest degree of accuracy before migrating it over to the new Open Solutions system."

"We were impacting every delivery channel and every process we had in place," Post emphasized. "This necessitated the need for us to study and understand our processes completely before we got engaged in Open Solutions' system. Our teams performed a process workflow analysis of every existing product and how we delivered it to our members. Doing this gave all of us an awareness of where changes would happen. We invested the time it took to make employees aware of how their jobs would change. Managing expectations gave people time to personally adjust to changes they would be making in how they do their work."

"We had an on-going side show to keep people's morale in a good place in the year leading up to the conversion," said Koenemann. "Human Resources created ancillary activities, raffles, days with free coffee or soda, and our training meetings incorporated humor to keep spirits up. Managers made a concerted effort to show our appreciation for how conversion planning was impacting everyone."

Managing expectations also extended to the credit union membership. Three months prior to the conversion, Vermont State Employees Credit Union communicated with its entire membership to alert them to the upcoming event. "We also identified 16 target groups of members to communicate with that we knew would experience change after our conversion to the new open architecture system," Post explained. "These ranged from 7,000 members who would experience a revised overdraft protection function to a group of about 20 members whose log-on i.d. for our home banking platform would change." Customized letters to members giving examples of specific changes that would impact them were mailed a month prior to the conversion. In addition, statement inserts explaining the conversion were mailed to all members two and three months prior to the conversion.

"It was essential to position ourselves to always be able to look a member in the eye and say 'we told you about this,'" said Post. "Our focus on member service is why we allowed enough time to test the system to our satisfaction." While standard testing protocols usually involve two cuts of data testing, the credit union's steering

committee and data integrity team asked for a third when they realized they needed some programming changes to meet unique product service requirements. Open Solutions accommodated their request, tweaked the programming logics, and the credit union and Open Solutions' migration team were prepared for Conversion Weekend.

When the long Conversion Weekend rolled around, the team was ready. "It goes back to building confidence in the conversion effort," Post emphasized. Friday night after the credit union closed, 12 employees began the work. Saturday's numbers grew to 24. Sunday saw all 44 members of the conversion team plus a few others. Human Resources turned the training room into a living room with a hospitality suite. Five or six employees brought home cooked meals for the hard-working conversion team members, and Sunday night's turkey and ham dinner was said to rival any Thanksgiving feast. Monday, the entire staff reported to work to test *The Complete Credit Union Solution*® and its full array of product modules in the new open architecture environment.

### Results:

"The attitude right after our conversion was really quite positive," Post said. "We had 125 people who had a pretty good idea of what their next day was going to be like. By noon of that next day, there was a big sense that we had accomplished a tremendous project. By the end of the week, employees were saying, 'Wow, we did it!'"

"We really did involve the entire organization from the very top to the very bottom," Koenemann stated. "That was important in terms of having a successful conversion."

"I've been happy with the success of the conversion because for many of our members it was a non-event," Post said. "We have a contract with our members to not only provide a list of services, but to provide services in a particular way. We kept our contract intact. Members have been very favorable."



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