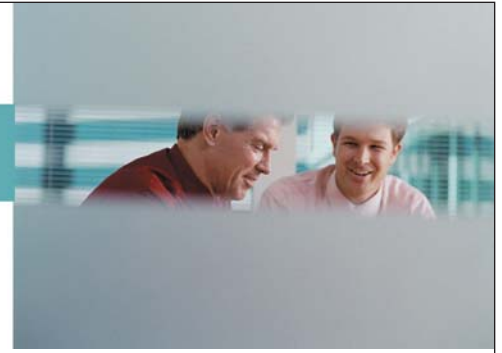


client focus



Three Rivers Worked Hard – And Worked Together With Partners – To Achieve Successful Upgrade To DNA



When Three Rivers Federal Credit Union changed core processing systems in 2003, they chose *The Complete Credit Union Solution*® (TCCUS) from Open Solutions because, explained the institution's Project Administrator Tiffany E. Yoquelet, the credit union was looking for a technology that could grow as they did.

History taught the credit union to prepare for growth. Opened on Valentine's Day in 1935 as the International Harvester Company Fort Wayne Works Employees Federal Credit Union, by 1965 the credit union was among the largest in the state of Indiana. And in 2003, they were expecting growth to result from the regulatory changes happening at the time in the industry.

"We needed the ability to handle business lending and business deposits," said Yoquelet.

They implemented TCCUS on Oct. 13, 2003 and five years to the day later, they upgraded to TCCUS: DNA. Asked what prompted the move, Yoquelet replied, "I found this quote from Edward Filene which I think explains it the best: 'Progress is the constant replacing of the best there is with something still better.'" (Filene, best known for expanding the department store chain bearing his name, was also instrumental in establishing the credit union industry in the United States.)

In order to make their transition to DNA as smooth as possible, the credit union prepared

for the upgrade by monitoring what other institutions had done or were doing, utilizing Open Solutions' Training Proficiency Program (TPP), communicating in great detail with both staff and members, and testing, testing, testing.

"We watched the early beta testers – Vermont State Employees Credit Union and USA Credit Union – to see how they were doing things," said Yoquelet. "They were a great help. And we went hand-in-hand with Beacon Credit Union; we had weekly meetings as we went through the process together."

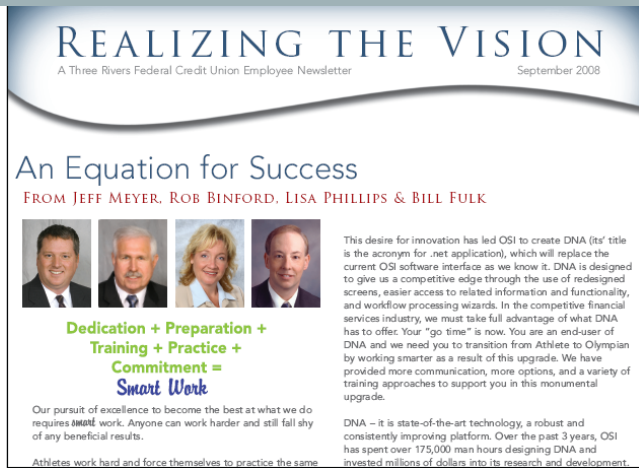
She continued, "We did a lot of work with our staff, too. We held weekly team meetings with representatives from each area of the credit union. We used a cView channel just for information on the upgrade: what features people liked, terminology, information about WebEx online training ... And we had mandatory practice through TPP, which I've always liked. We customized it for each area: tellers, IRAs, loans and a general navigation test that everybody had to take prior to the upgrade."

Other training methods employed by Three Rivers included online demos of DNA, classroom instruction, lab days for one-on-one assistance and independent practice time.

They communicated this information and more to their staff through their monthly

Three Rivers Federal Credit Union opened on Valentine's Day in 1935 as the International Harvester Company Fort Wayne Works Employees Federal Credit Union, employing three people. By 1965 the credit union was among the largest in the state of Indiana. In 1982, the institution became Three Rivers Federal Credit Union and has steadily expanded ever since. Today, Three Rivers FCU represents more than 70,000 business and individual members while operating 19 branches in Indiana and Northwest Ohio. The credit union provides a full line of financial services ranging from checking and savings accounts, to mortgages, business services, investment services, trusts and more.

www.3riversfcu.org



newsletter, "Realizing the Vision." The September 2008 issue was completely centered around DNA and in it, each of the credit union's vice presidents addressed his/her department's connection to the upgrade as well as the expected improvements, such as navigation, convenience and overall satisfaction. One writer likened it to the television program, "Extreme Makeover: Home Edition." He dubbed DNA "Complete Software Makeover" and wrote, " ... you'll be amazed at positive changes" and "surprised at how much more efficient DNA is."

The newsletter also included plenty of encouragement to embrace the new system and to train for its use. As one writer noted in her

newsletter article, "Dedicate the time. Navigate the system. Anticipate your needs."

A full-fledged marketing communication plan prepared Three Rivers' members for the Columbus Day weekend upgrade. Among other message channels, "We posted information on our Web site and on eCommerce Banker™," said Yoquelet. "We also had signage in the lobby and we changed our phone recording to include information about the upgrade. I think it was very seamless to our members – we had a few glitches, but overall it was OK. I think the most important thing was that we practiced."

And tested.

We were fanatic about testing and practicing because we wanted to ensure a smooth transition for our staff and our membership. We tested and re-tested throughout the entire process. Testing provided a great tool to become familiar with the many enhancements of DNA. Every time an SU was loaded, we tested. During the upgrade process, we worked with Open Solutions, our vendors and other credit unions. After we upgraded our system and before we opened our doors to our membership, every area completed go live testing so we could rest assured that when we opened our doors on Tuesday, we'd be ready. We had a few minor issues and consider the upgrade a huge success. The most important thing, we tested and practiced."

"We have seen benefits. The favorites quickly take the tellers where they need to be. Transaction Express is a good way to do transactions. The wizards are nice. It's more efficient overall – the system has multiple ways to do various things."

Three Rivers had Open Solutions' Professional Services on site during the upgrade weekend. "It made it really nice," said Yoquelet of the guidance and assistance. And of their consultant: "He did some work and let us go home to sleep a little bit at around 8 on Saturday night. When the system came up at 3 a.m., we went back."

Since that early morning "go live," Yoquelet said, "We have seen benefits. The favorites quickly take the tellers where they need to be. Transaction Express is a good way to do transactions. The wizards are nice. It's more efficient overall – the system has multiple ways to do various things."

And the credit union wisely turned to multiple sources to successfully prepare for their upgrade to DNA.

Said Yoquelet, "It all came down to a team effort: Open Solutions, our staff, Beacon and the beta testers – we all pulled together nicely."

For more information on DNA or any of our products, please contact your account manager or email us at info@opensolutions.com.



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