Case Study

Keesler Federal Credit Union

Keesler Federal
CREDIT UNION

Headquarters: Biloxi, Mississippi

Assets: $4.1 billion (as of September 30, 2023)

Serves: 316,936 members

Keesler Federal Credit Union is the largest credit union headquartered in the state of Mississippi, with over 316,000 members served via 39 branch locations throughout the Mississippi Gulf Coast, the Hattiesburg and Jackson metro areas, the St. Tammany and Orleans parishes in Louisiana, and in Mobile, Alabama. Founded in 1947, Keesler holds assets of $4.1 billion, making it one of the largest financial cooperatives in the Southeast U.S.

With a mission to "Be Extraordinary," supported through its core values of Authenticity, Approachability, Commitment, and Empathy, Keesler has positioned itself as a leading financial institution in the markets it serves, all while maintaining a "relationship-based, local focus that is an essential part of the credit union experience."

Challenges

Keesler sought to automate processes across the organization in order to:
- Ensure critical jobs are completed in a timely manner
- Provide individual business units with the tools to operate more efficiently and independently
- Reduce errors and opportunities for failure
- Get time back for staff to focus on higher priority tasks and initiatives

Solution

To achieve these goals, Keesler deployed OpCon from SMA Technologies, a workload automation and orchestration (WLA&O) solution that offers enterprise-level functionality and scalability without the complexity.

Results

After implementing OpCon, Keesler has now:
- Reduced manual errors and file transfer failures
- Achieved greater visibility into operational processes
- Given time back to employees to work on higher-impact projects and tasks
- Provided the business with more independence through self-service capabilities
- Created a better experience for members

The Cost of Complexity

As a large and fast-growing cooperative, Keesler has always embraced innovation, whether that means adding new products and services to meet evolving member needs, or continuously refining a complex technology stack to serve a scaling enterprise.

Such complexity comes with a cost, however. According to Shana Rader, System Analyst at Keesler, the Credit Union runs roughly 450 to 500 jobs each weekday and 200 over the weekend. In the past, these processes were performed manually, which opened the door to human error and the potential for file transfer and system failures.

"We have daily processes that have to be completed in a timely manner," Rader says. "They include ACH settlement and files we send internally as well as externally. We have over 20 vendors to which we send files throughout the day."

Keesler also wanted to give individual business units—including those staff with less technical knowledge—the tools to operate more efficiently and independently.

Rader recognized that automating key processes would allow staff both within and outside IT to get time back to focus on higher-value strategic initiatives.

> My experience working with the SMA team has been very collaborative. It builds trust because I know when we need help, they're going to help us get to the root of the problem and we're going to resolve it."
>
> Shana Rader, System Analyst at Keesler Federal Credit Union

Automating Outside of IT

Faced with these challenges, Keesler looked to OpCon from SMA Technologies, an innovative workload automation and orchestration solution designed to improve operational efficiency, save time, and reduce costs.

As a system analyst, Shana primarily monitors Keesler's OpCon automation processes and works with other business units to implement any new automation requests. "Life without OpCon was extremely busy," Rader says. "I don't think there would be enough time in the day without OpCon."

Although Keesler outsources its core processing system, the Credit Union continues to identify a virtually unlimited number of processes that can benefit from automation, both within IT as well as in the business. "In my role, I really focus on looking for things that we can automate," Rader says. "I want to see how we can refine our processes. We are always looking for ways to do things better."

OpCon has delivered measurable process improvements to multiple departments around the organization, from audit and marketing to HR. "With OpCon, we have been able to automate processes for our audit department," Rader says. "We have a self-service button that will run a Symitar job to generate reports. That's been a great benefit to them because now they don't have to reach out to another department to run that report for them.

"For our marketing department, we have jobs that perform file maintenance within the core system, which is beneficial because that helps them tailor mailers that go out to the membership. We're always looking for ways to refine the processes that we already have in place."

Deploying OpCon couldn't be easier, thanks to SMA's industry-leading implementation team. SMA's consultants are experts at credit union automation and have fine-tuned the processes for installation and migration from outdated schedulers. SMA's expert consultants can typically train and prepare internal teams for go live by the end of a two-week engagement.

"I found the training experience to be great," Rader says. "The SMA team has been really hands on, very patient, and very willing to answer any questions that I had. It really gave me a good understanding of how our jobs are set up, and in turn, that has allowed me to think of different ways that we could set up automation for different processes. I just really appreciate the time that the team took to help me understand that."

> If there's a process that we can automate, we're going to try to automate it because that's time we're going to get back that we can devote to other areas."
> Shana Rader, System Analyst at Keesler Federal Credit Union

SMA
TECHNOLOGIES

With OpCon,
Everyone Benefits

Following the implementation of OpCon in its operations, Keesler Federal Credit Union is experiencing outstanding results:

Gained Time Back

OpCon streamlines complex processes, enabling staff to get time back in their workday to focus on other, higher-value tasks and projects. "I believe OpCon is a workforce multiplier," Rader says. "It allows you to focus your attention on other initiatives. It reduces busy work and lets you focus on the things that really matter to the organization."

Better Member Experience

OpCon doesn't only provide exceptional benefits to internal users. The modern automation solution also ensures that members will benefit from Keesler's exceptional service and a modern digital experience that can compete with the largest financial institutions in the world.

"I believe automation has increased accuracy, enhanced efficiency, and improved security for our members," Rader says. "Overall, I think it's a great benefit to the membership."

More Freedom and Flexibility

OpCon offers operational control over the most complex environments and easily scales as your business grows. With advanced workload automation capabilities like frequency scheduling, master/daily scheduling, and multi-instance scheduling, organizations like Keesler can streamline both routine and on-demand processes, whether within or outside the core. OpCon provides optimal flexibility and visibility, while reducing errors.

> OpCon reduces busy work and lets you focus on the things that really matter to the organization."
>
> Shana Rader, System Analyst at Keesler Federal Credit Union

Greater Visibility into Operational Processes

With OpCon's full-featured, easy-to-use dashboards, Keesler gains a bird's-eye view of all automated jobs run throughout the organization, ensuring greater job control.

Enabled Departmental Independence Through Fast, Easy Automation

OpCon empowers organizations to quickly automate workflows and reduce the burden on the IT team. Most tasks can be automated in low code, no scripting needed, to save time and resources. And through OpCon's Self-Service application, business stakeholders can trigger automated processes at the click of a button—no IT support necessary.

For example, Keesler has been able to automate monthly report distribution for the HR department, eliminating the need for IT involvement and ensuring the department receives critical information in a timely manner. "This alleviates the need for them to reach out to a different department to request those reports, helping to streamline their monthly processes," Rader says.

Preventing Critical Failures

Through OpCon, Keesler now has a single source of truth, helping to reduce human error and the likelihood of file transfer and system failures. This foolproof approach helps ensure that jobs run on time, every time, without fail.

"OpCon helps us be proactive instead of reactive in preventing failures because it provides increased visibility," Rader says. "We know exactly why a process fails, which allows us to take steps and make adjustments to the job to avoid those failures in the future."

> " I don't think there would be enough time in the day without OpCon. Even with an outsourced core, OpCon is essential."
> Shana Rader, System Analyst at Keesler Federal Credit Union

OpCon Helps Keesler Keep Up with Industry Changes

The success Keesler has had to date with automating processes throughout the Credit Union is helping Rader imagine the possibilities.

"If there's a process that we can automate," Rader says, "we're going to try to automate it because that's time we're going to get back that we can devote to other areas. It's also going to improve the stability of our processes."

Having already benefitted from automating many of its core and business processes in diverse departments such as HR, audit, and marketing, Rader believes the sky is the limit when it comes to OpCon.

"It's going to help our team grow as well," Rader says. "I believe automation is so powerful because it removes a lot of repetitive work. It gives you time to focus on different initiatives and allows you to contribute to your organization in other ways. Even with an outsourced core, OpCon is essential. Everything changes in this industry, and SMA is going to help you keep up with those changes."