



Case Study

TRUE Community Credit Union



Headquarters: Jackson, Michigan

Assets: \$713.4 million (as of September 30, 2023)

Serves: 66,057 members



Founded in 1953, TRUE Community Credit Union has pursued innovation and excellence throughout its history. With 201 full-time equivalent staff and assets of \$713.4 million, TRUE serves its 66,000 members through 12 branches across Michigan state.

The cooperative’s mission, “To cultivate legacy-defining moments for the people and places we serve for generations to come,” is in service to its purpose, “To inspire the pursuit of a life well-lived,” and is supported by key values of “Joy, Stewardship, People, Empower, Gratitude, Feedback, Curiosity, and Opportunity.”

TRUE is a full-service financial cooperative, offering deposit accounts, personal loans, home loans, and digital services, along with a comprehensive suite of loans and accounts for business members.

Challenges

TRUE desired a solution that would help it:

- Reduce manual processes throughout the organization
- Eliminate the need to actively monitor goodnight and month-end processes
- Reduce errors and opportunities for failure
- Get time back for staff to focus on serving members

Solution

To address these challenges, TRUE underwent a core system migration, and implemented 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, TRUE has succeeded in:

- Reducing staff time spent on routine manual processes
- Providing a better employee experience and quality of life
- Achieving more consistency and reliability in operational processes
- Effectively managing cloud services and workflows across multiple vendors
- Creating a better member experience

All Signs Point to Automation



TRUE Community Credit Union has experienced rapid growth in recent years, following its adoption of a state charter, completion of a major merger, and subsequent name change. As it's scaled, the organization has been challenged to support evolving member needs, while dealing with an increasingly sophisticated technology stack and complex operational processes.

TRUE's IT leaders recognized the need to automate its time-consuming manual workloads in order to keep up with the times and keep moving forward.

"Before we migrated to our new core and implemented OpCon, there were a lot of processes that had to be done manually," says Chase Fisher, System Analyst at TRUE. "We had maybe one little script to run to help us get through it."

A stark example of this challenge was TRUE's "goodnight" processes, which required a member of the IT staff to access sensitive areas of the core system and manually start jobs every evening at closing.

"You had to go into that restricted area of the core that only certain people have access to in order to queue up certain jobs and let them run in order," Fisher says. "Before OpCon, the outcome would often not be a 'good night.'" Staff would be charged with monitoring the goodnight processes "all night long," every night. "The system would run one job and then I would have to manually go to a backup, move the backup, and then continue on the next job."

Month-end processing presented many of the same issues as the goodnight job runs but on another level. "Month-end is a lot like daily goodnight, except it just takes a lot, lot longer because there are so many more reports," Fisher says. "We're also generating statement files; we're affecting all of the members' accounts, as well as their dividends and money transfers. It is just crazy. I could be working into the super early hours of the first of next month just trying to get things where they need to be."

Core Migration Brings the Power of Automation

Faced with these pain points, TRUE's leaders decided to undergo a core system migration to improve the organization's automation capabilities and overall security. In addition, TRUE selected OpCon from SMA Technologies, an innovative workload automation and orchestration solution designed to improve operational efficiency, save time, and reduce costs.

Today, OpCon runs between 300 and 600 jobs each day for TRUE, which translates to roughly 10,000 jobs per month. Fisher raves about the ease and convenience of using OpCon, which is bolstered by SMA Technologies' world class customer support and training.

"Working with SMA is really refreshing. I know I can rely on their customer service. If I send off an email, they're right on top of it and get back to me right away."



I can't speak enough for the support that I get from SMA and the help desk there. It's always been a positive experience. I've never had anything negative come from it, and it seems like everyone's willing to help everyone and the community around it is really, really useful and beneficial."

Chase Fisher, System Analyst at TRUE Community Credit Union

Getting Part of Our Life Back

TRUE Community Credit Union is experiencing the unmatched power of OpCon automation, which has allowed the organization to experience the following results and benefits:

Fast, customizable 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.

"I feel the biggest difference between using OpCon in reference to the goodnight process is just the customizability," Fisher says. "There are certain jobs that we can queue up in the core and make more robust."

Managing cloud services easily

As tech stacks grow increasingly complex, it's vital for organizations like TRUE to be able to manage multiple cloud-based vendor relationships effectively and efficiently. OpCon streamlines file transfer processes, member service interactions, and vendor integrations across a variety of system environments, whether on-prem, hybrid, or in the cloud.

"We use OpCon automation through a lot of our different vendors," Fisher says. "For example, we set up automation with our imaging vendor, and it runs all day long. The receipts generated by our tellers go to a network location, and OpCon runs a job every half hour. The job zips up anything in that folder, ships it off to the vendor, and then the vendor receives the file and saves the receipts."

Without OpCon, tellers would be responsible for saving each transaction receipt, zipping them up, and dragging and dropping them into a folder on the local server—a time-consuming and error-prone process.

"Because OpCon is constantly grabbing those files as they're generated, it helps alleviate a lot of that pressure on our tellers," Fisher says. "It really streamlines their process and helps prevent issues and errors."

A better member experience

By reducing the amount of time staff must spend on routine, manual process steps, OpCon enables a more positive and engaging member experience—a critical factor in ensuring TRUE can compete in today's world of high expectations.

For example, by automating the receipt submissions to TRUE's imaging vendor, tellers have fewer process steps to complete during each teller line interaction, resulting in more time to interact and engage with the member in front of them.

"This specific imaging process with OpCon provides the tellers with more time they can use to help our members," Fisher says. "It's fewer process steps for them to worry about in their daily routine."

Achieved better consistency and reliability

With advanced workload automation capabilities like frequency scheduling, master/daily scheduling, and multi-instance scheduling, OpCon provides financial institutions with full operational control over the most complex environments. It bridges gaps among networks and servers, provides optimal flexibility and visibility, and uses active notifications and alerts to prevent failures caused by inadvertent human or system error.

"Right now, our goodnight process is automated to the point where it just runs," Fisher says. "If there's a problem, OpCon will alert us and even provides information on how to fix it."

Gained time back

OpCon streamlines complex processes, saving time and reducing the burden on IT and departmental staff. For Fisher, this means not only do employees get time back to focus on higher value projects and tasks, but they "get part of [their] life back."

"It really does take a lot off our plate when we are already busy with projects," Fisher says. "If someone's considering getting OpCon, I would say do it—it's a no brainer. It really does make your life easier. It really helps with work life balance, and that's what I enjoy."



The key benefit of OpCon is the time saved. Everything is automated, which just saves time and reduces the stress on employees. We can move forward with our life and have peace of mind."

Chase Fisher, System Analyst at TRUE Community Credit Union

Driving Future Growth Through OpCon

TRUE's employees have come to expect that automating routine processes through OpCon will help them achieve greater productivity in their workdays. And it has helped them to imagine the possibilities.

"OpCon is a verb here. That's just how I've always branded it. I tell my colleagues, 'OpCon is going to be your best friend. It's there to help you move forward and do your job and make your life easier.'"



I can't imagine not having OpCon now. It's just that much of a powerhouse. If you have the ability to obtain it, do it."

Chase Fisher, System Analyst at TRUE Community Credit Union

"The key benefit of OpCon is the time saved," Fisher says. "We have processes that kick off before people wake up just to make sure that they're running on time. And we have processes running while everyone's asleep at night. Everything is automated, which just saves time and reduces stress on the employees. We can move forward with our life and have peace of mind."

For Fisher, witnessing the powerful capabilities of automation through OpCon at work has inspired him to dream bigger—even in his life outside of TRUE.

"If I could have OpCon in my personal life, I would," Fisher says. "There are so many things that I would automate at home—from bills to standard backups. I might be a nerd, but it's something I've always thought about; I would love to have this at home!"

