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Identifi Case Study:

FIRST TECH FEDERAL CREDIT UNION

First Tech Federal Credit Union:
A Distinctly Different Financial Institution

CHALLENGE

First Tech Federal Credit Union, an Identifi client since 2006, needed to execute a complex upgrade of its technology platform to accommodate a change in software support from Microsoft.

SOLUTION

Identifi worked closely with First Tech to plan and successfully implement a complex upgrade to Identifi's platform.

Since it was founded on Jan. 14, 1952, First Tech Federal Credit Union (First Tech) has relied on dedicated customer service and innovative products to serve its members, many of whom are associated with well-known technology companies like Google, Microsoft, Amazon, Intel and more.

Founded by a few astute employees at Hewlett-Packard and Tektronix, First Tech is the nation's premier credit union serving the world's leading technology-oriented companies and their employees. In 2010,

First Tech merged with Addison Avenue Federal Credit Union in the biggest merger in the history of the National Credit Union Administration.

First Tech has grown to 33 locations throughout California, Colorado, Oregon and Washington to name a few, with more than 720,000 members and $14 billion in assets.

"Our background in technology as a serving base makes us distinctly different in the marketplace," said Alex Bannister, First Tech's senior program manager of core operations.

Big Growth Leads to Big Challenges

Despite its unique origins and deep roots that set itself apart from its competitors, First Tech's considerable growth led to a problem that many financial institutions face: managing large amounts of data through tedious manual processes.

Bannister said the credit union spent plenty of time and effort to try to remediate issues that stemmed from antiquated data management processes and procedures.

"We'd been doing a lot of work in our systems, as well as our workforce and processes, really trying to get things streamlined," said Bannister. "Our internal team expressed the need to improve processes."

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Setting the Records Straight

In addition, First Tech had completed several mergers and acquisitions, which meant the absorption of copious amounts of records. Kimberlee Gloor, First Tech's senior manager of the records management team, said bringing in new records—on top of maintaining current records—presented its own set of challenges.

"When you get records from another financial institution, you receive them in whatever condition they were storing them in, despite what your standard is," said Gloor. "We're talking pre-digital archival of everything; it was all manual."

To streamline processes, increase efficiency, improve data management and nurture scalable growth, the leadership team at First Tech began working with Identifi in April 2006. Identifi works with financial institutions to simplify business processes through products that incorporate the best of enterprise content management (ECM), business process management (BPM), electronic signatures and much more.

This was the beginning of a long-term, fruitful partnership between First Tech and Identifi.

Reaping the Benefits of Digital

The first step for Identifi was to set up First Tech on its platform, one that would provide new digital capabilities. For the first time, the credit union began reaping the benefits of

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digital receipt capture, E-Signatures on new account forms and document management that provided increased security, compliance and efficiency.

"Identifi gave us an opportunity not only to organize our records, but to search for them digitally and retrieve them much faster," said Gloor. "This improved our ability to respond to any number of inquiries, both for our members and our staff."

First Tech's usage of Identifi E-Signatures evolved beyond just membership applications. Gloor said the institution uses E-Signatures on a slew of different documents, including IRA documents, debit card instant issue documents and affidavits, because the functionality integrates so well throughout the entire platform.

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Gloor also raved about the additional security, fraud prevention and peace of mind that came with capturing digital receipts.

"If a member comes to us and questions a fraudulent transaction, we can quickly and easily go into Identifi, find a signed receipt and start an investigation for them. It's much better than searching through a mountain of paperwork," said Gloor.

Despite First Tech enjoying all its digital improvements, a slight roadblock would eventually surface that would require both the credit union and Identifi to take action.

Required Upgrade, Inspired Implementation

Everything was working perfectly for First Tech on the version of Identifi's platform they were using. Unfortunately, Microsoft announced they were ending support for Internet Explorer, the browser that worked best with version 4.5 of Identifi's platform.

So even though the team at First Tech was happy with the platform and had a great understanding of how it worked, the Microsoft decision required them to plan for an upgrade sooner than anticipated. Migrating to Identifi's "Unified" platform meant First Tech would need to upgrade servers, move software from older operating systems and other requirements that added considerable complexity. For clients who do not want to host solutions on the premises, Identifi offers private, software-as-a-service cloud hosting—which First Tech plans on taking advantage of in the future.

"It's like we had two different projects going on. We had to update our environment, then focus on moving over all the data and upgrading," said Bannister. "But everybody on the Identifi team is so spectacular, that we actually finished three weeks ahead of schedule. There was no shortage of talent, commitment and elbow grease."

There was also no shortage of new functionality and improved service for First Tech on the new Unified platform.

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Going from Fantastic to Flawless Functionality

In the previous version of the Identifi platform, First Tech needed to access multiple URLs to reach their different products, like the E-Signatures desktop and E-Receipt environment. But on the new, Unified platform, all of their products are available at the same URL—in addition to benefiting from cross browser functionality and responsive design. This greatly improved efficiency, reporting and search functionality, which is important considering First Tech possesses more than 30 terabytes of data.

In fact, Gloor said it would take anywhere from seven to 10 seconds to retrieve information on their old platform. The new version cut that time in half.

"It's things like the improved search that make the user experience greater," said Gloor. "The team at Identifi helped me understand and take advantage of all these improvements, and I think that was key to the success of this project."

A Distinctly Different Partnership

A distinctly different financial institution like First Tech Federal Credit Union deserves a technology partner that knows what it needs to thrive. And after 15 years of working with Identifi, the team at First Tech believes the best is yet to come.

"It's a great relationship, and we work really well together," said Gloor. "Identifi matches

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our energy and goes above and beyond for us. That's what allows us to take advantage of all the really tremendous services that Identifi offers."

"Our relationship with Identifi is significantly different than your average vendor partnership," said Bannister. "Every single person we work with at Identifi is a competitive advantage for us."

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