

Four Points FCU Went Live with a New Core and ECM on the Same Day.



Two Weeks Later, Their CFO Was Advocating for Both.

Overview

Four Points Federal Credit Union faced a problem most credit unions avoid: implementing document management during a core conversion.

Their previous core included very basic document imaging. Converting to Corelation eliminated that capability entirely. Documents lived across multiple disconnected systems and various automation tools. Each handoff created failure points.

Most credit unions wait 6-12 months after core conversions to tackle ECM.

Four Points didn't have that luxury, and they didn't want months of operating with document management gaps that would become permanent workarounds.

The Challenge

Core conversion eliminated their existing document management

Switching from a system with built-in imaging to Corelation meant starting from zero. Four Points needed a solution that wouldn't create new gaps.

Too many vendors, too many handoffs

Getting documents searchable required coordinating Keystone batch jobs, WRG core services, Jack Henry IT, and automation tools. Dynamic IP addresses. Static IP requirements. Permissions across partners who don't regularly talk to each other.

"[We were] trying to get all those different parties to communicate," said Four Points CFO, Gavin Peterson. "It [was] insane."

No staff available for dual projects

Core conversions consume everyone who understands systems and data flows. Running ECM simultaneously meant either splitting an already-stretched team or finding a partner who could work independently.

"When you're doing a core conversion, all your people are focused on core. Having your doc imaging partner take the bulk of that workload off is a no-brainer."

— Shane Asbel, VP of Sales for Identifi

The Solution

Identifi handled 90% of the implementation work—running bi-weekly meetings, configuring modules, and delivering training around core conversion demands. The team brought 75 combined years of banking experience, so they already understood loan categorization, retention requirements, and audit workflows without extensive explanations.

When Four Points hit IP coordination issues Identifi immediately understood the banking infrastructure constraints and solved them.

The Results

Same-day go-live succeeded

Getting documents searchable required coordinating Keystone batch jobs, WRG core services, Jack Henry IT, and automation tools. Dynamic IP addresses. Static IP requirements. Permissions across partners who don't regularly talk to each other.

~10 hours saved weekly

Time savings grow as workflows reach full automation. Electronic annotations replaced printing and filing, improving audit readiness while reducing costs.

Cost-neutral with expanded capabilities

Same cost as before, but with additional scanning licenses, new automation capabilities, and centralized document access.

Support tickets resolved in ~1 hour

Four Points' previous provider took weeks to respond. Identifi resolves issues in roughly an hour and works through unique infrastructure challenges instead of deflecting.

What This Means for Your CU

Core conversions already stretch every resource you have. Adding document management to that timeline sounds impossible because most ECM vendors need constant internal support—pulling the same people your core conversion can't afford to lose.

Four Points ran both projects simultaneously because Identifi's implementation model is fundamentally different. Their team handled the technical work, understood banking operations without lengthy explanations, and resolved infrastructure issues rather than creating tickets that sit for weeks.

Days after going live, Peterson was at the Corelation conference sharing what worked. Not because the implementation was easy—core conversions never are—but because having a partner who could work independently changed what was possible.

"The service we've received from Identifi has been wonderful, above and beyond. They've helped us with resolutions, scripts to extract files. They're always there if we have questions."

— Gavin Peterson, CFO for Four Points FCU

Planning a core conversion? Read the full case study to see how the implementation actually worked and what made it possible to run both projects without splitting the team.

