

CASE STUDY

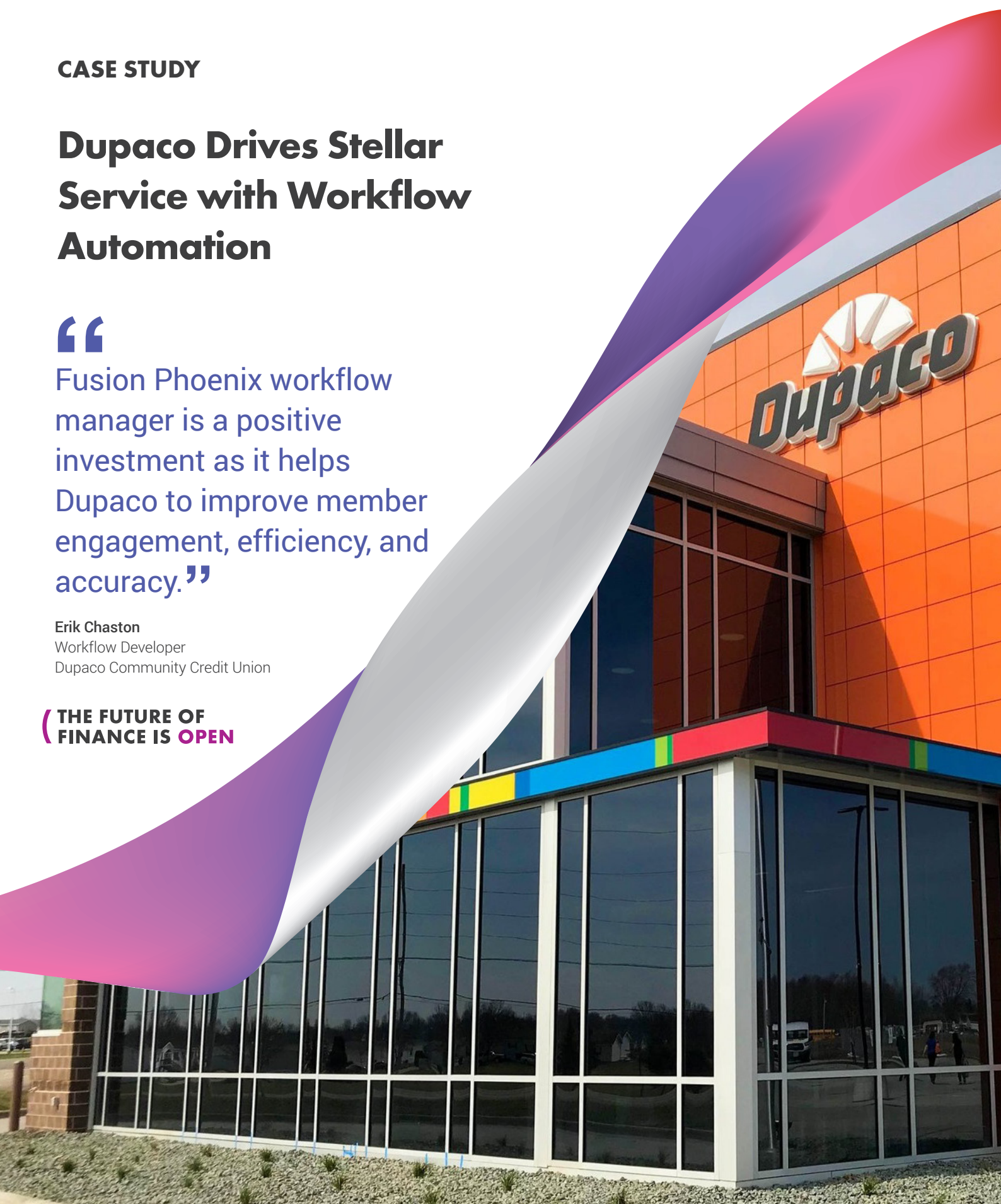
Dupaco Drives Stellar Service with Workflow Automation



Fusion Phoenix workflow manager is a positive investment as it helps Dupaco to improve member engagement, efficiency, and accuracy.”

Erik Chaston
Workflow Developer
Dupaco Community Credit Union

**THE FUTURE OF
FINANCE IS OPEN**



At a Glance

Solution

- Fusion Phoenix

About Dupaco

Dupaco Community Credit Union is a full-service financial cooperative headquartered in Dubuque, Iowa. Founded in 1948 by 10 employees of the Dubuque Packing Company, today Dupaco provides more than 109,000 members with a range of cost-effective financial, insurance and investment services.

The Challenge

As business at Dupaco boomed, the credit union wanted to stay on track for improved member engagement, efficiency and accuracy without compromising on the high-quality, personalized service it is known for. To unlock new efficiencies and free up front-line teams to focus on interacting with clients, Dupaco looked for a way to streamline key processes.

The Solution

A longstanding user of Finastra's Fusion Phoenix core solution, Dupaco harnessed its workflow manager to automate common tasks and processes. Today, the organization has established consistent, efficient workflows for processes including payroll and transfers, helping staff work faster and more accurately, and providing a full audit trail for compliance.

The Result

Dupaco can release front-line employees from repetitive manual work, giving them more time to dedicate to building relationships—making for a more rewarding member experience.

dupaco.com



Fusion Phoenix's workflow manager gives us much better visibility and control of end-to-end processes. Not only does this help us manage processes more effectively, it also allows us to provide a better response when members get in touch.”



Erik Chaston

Workflow Developer, Dupaco Community Credit Union



Fusion Phoenix's workflow manager really empowers our teams to get through their work quickly and effectively, so they can focus more of their time and attention on members."

Brandie Backes

Workflow Developer, Dupaco Community Credit Union

By automating repetitive processes with Fusion Phoenix workflow manager, Dupaco supports faster, more consistent and more accurate ways of working

The Challenge

From humble beginnings, Dupaco has grown into one of Iowa's leading credit unions. Along the way, the organization's mission has always remained the same—to improve its members' financial position and build valued relationships with the community it serves.

In the last few years, they've been focused on growing into new areas—including more rural communities that have traditionally been underserved by financial institutions—and expanding their range of services while continually engaging existing and new members.

As Dupaco grew from strength to strength, it was determined to maintain the high level of service that its members had come to expect.

Keith Chaston, IT Operations Supervisor at Dupaco, says: "Whether it's opening a new account or issuing a mortgage loan, the services we provide often involve many different steps. As we took on more business, we wanted to avoid weighing staff down with more administrative work.

"We believe our teams should spend most of their time face-to-face with members, not hidden behind a computer. To free up more time for one-on-one member interaction, we looked for a way to automate as many routine tasks as we could."

The Solution

Since 2010, Dupaco has counted on Fusion Phoenix from Finastra to support core operations. The organization decided to build on this foundation with Fusion Phoenix workflow manager, using the solution to automate key processes.

Keith Chaston, Information Technology Operations Supervisor at Dupaco, recalls: "We were one of the first credit unions to go live on Fusion Phoenix workflow manager, and were closely involved in the development process. The Finastra team was open to our input and willing to mold the solution based on our feedback and needs."

Dupaco has harnessed the workflow manager to streamline several workflows, including payroll processing and transfers. Additionally, the organization automated Pay Pause requests—a popular promotion where members can pay \$25 to pause a loan payment without incurring penalties. Dupaco typically runs the promotion in December, processing between 10,000 and 15,000 requests.

Many members deduct loan payments from their salary, and if they wanted to pause a payment, the payroll team had to manually remove the loan from distribution so that the funds would not be deducted, then fill in a new service request to return the loan to distribution. This process is now completely automated by Fusion Phoenix's workflow manager.

"In the past, we had a team of 10 to 15 people managing Pay Pause requests, whereas today we need just 3 people to handle the same work," comments Erik Chaston, Workflow Developer at Dupaco. "Fusion Phoenix's workflow manager has made our Pay Pause service much more efficient and profitable."

Newfound Insight and Control

Improved workflow management has also enabled Dupaco to track process changes in a more straightforward and consistent way. Previously, as employees worked through a certain process, they used paper checklists to track actions.

Today, Fusion Phoenix workflow manager guides teams through pre-defined process steps and provides a complete record of all actions taken—helping Dupaco to ensure that all tasks are completed properly and offering a full audit trail to strengthen compliance.

Erik Chaston states: "Fusion Phoenix's workflow manager gives us much better visibility and control of end-to-end processes. We can easily see what actions have been taken, by which employee and, if necessary, which member has authorized that action. Not only does this help us manage processes more effectively, it also allows us to provide a better response when members get in touch.

"For example, a member might call in because he's noticed that his address has been changed and he doesn't remember requesting the change. Our member services team can pull up contact records and explain that his wife, who is authorized, made the change on a certain date. Giving members fast, well-informed answers helps build their trust and makes for a much more positive experience overall."

With efficient workflow management, Dupaco frees teams to focus on face-to-face member interaction and supports profitable growth



With Fusion Phoenix workflow manager, we're reducing reliance on dual data entry and manual work, and can be confident that processes are running flawlessly.”

Keith Chaston

IT Operations Supervisor
Dupaco Community Credit Union

Greater Efficiencies, Better Service

By automating key workflows, Dupaco empowers its teams to work more productively and minimizes the risk of process errors and inconsistencies.

“When you have people manually handling a process and entering data into systems, it opens up room for errors to creep in,” remarks Keith Chaston. “With Fusion Phoenix workflow manager, we’re reducing reliance on dual data entry and manual work, and can be confident that processes are running flawlessly.”

With employees free from tedious and time-consuming tasks, they will have more time to devote to one-on-one interactions with credit union members.

Brandie Backes confirms: “Our teams have so many tasks to handle every day, and Fusion Phoenix workflow manager really empowers them to get through that work quickly and effectively. This means that our people can focus more of their time and attention on members, strengthening relationships and shaping a much more rewarding and personalized member experience.”

Growing Strong

Importantly, as Dupaco adheres to its mission, the efficiencies delivered by Finastra technology will help the organization to keep tight control over costs.

“The workflow manager in Fusion Phoenix helps us maintain lean operations as we expand into new markets and welcome new members,” says Erik Chaston. “We’ve been able to redistribute resources, as improved efficiencies have enabled us to move existing employees into different roles, which has been a great help in keeping down costs.”

He concludes: “Fusion Phoenix workflow manager is a positive investment as it helps Dupaco to improve member engagement, efficiency, and accuracy.”

About Finastra

Finastra unlocks the potential of people and businesses in finance, creating a platform for open innovation. Formed in 2017 by the combination of Misys and D+H, we provide the broadest portfolio of financial services software in the world today—spanning retail banking, transaction banking, lending, and treasury and capital markets. Our solutions enable customers to deploy mission critical technology on premises or in the cloud. Our scale and geographical reach means that we can serve customers effectively, regardless of their size or geographic location—from global financial institutions, to community banks and credit unions. Through our open, secure and reliable solutions, customers are empowered to accelerate growth, optimize cost, mitigate risk and continually evolve to meet the changing needs of their customers. 90 of the world’s top 100 banks use Finastra technology. Please visit [finastra.com](https://www.finastra.com)

Finastra and the Finastra ‘ribbon’ mark are trademarks of the Finastra group companies.

© 2018 Finastra. All rights reserved.

US1188 / 0818

North American Headquarters

605 Crescent, Executive Court,
Suite 600, Lake Mary,
FL 32746
United States
T: +1 800 989 9009

