

# Symitar® Users: Community, Collaboration, and Connection



Vibrant, active, sharing – these are a few of the words that come to mind when describing the community of Symitar clients. The level of engagement and excitement among users is an often-overlooked aspect of a credit union’s technology platform.

Why is there so much interaction among Symitar clients? To answer this question, it’s first important to truly understand the strength and fortitude of the Symitar community. Despite all the challenges created in 2020, this community of credit unions remained vibrant, resilient, and eager to get together – even in a virtual environment. In fact, even though Symitar’s annual educational conference was hosted virtually for the first time in 2020, the event saw record-breaking attendance. More than 3,000 credit union leaders, representatives, and technology partners came together to learn and connect. That’s why Symitar has more than three times as many clients on a single technology platform than any other core provider. It serves more than 700 credit unions of all types and sizes. The company solicits and receives a great deal of focused, pragmatic feedback from these users, and that feedback directly guides development efforts. So the first reason is that clients know their feedback is valued and acted upon.

The second reason is that its core platform, Episys®, is built for customization. Just as some automobile enthusiasts share information on how to increase performance or change the look and feel of their cars, Episys users share tips on how they’ve made certain tasks easier or more efficient.

Symitar encourages cross-communication and sharing on all subjects related its platform. It creates opportunities for clients to interact, and clients also form their own groups. Here are some examples of community collaboration:

## **SYMITAR STRATEGIC INITIATIVES SYMPOSIUM**

Each year, Symitar offers an invitation-only, big picture event carefully designed to give credit union executives the chance to step away from the day-to-day and focus on future initiatives. Attendees explore and discuss tactics based on current and predicted market trends, share success stories and experiences, and collaborate with the credit union community.

## SYMITAR PRESIDENT & CEO FORUM

Held in conjunction with the SEC, the Symitar President & CEO Forum brings together leaders of credit unions to exchange ideas, network with likeminded peers, discuss current and upcoming challenges and opportunities, and interact with Symitar and Jack Henry leadership. This complimentary event is hosted by President and CEO of Jack Henry, David Foss, exclusively for credit union presidents and CEOs.

“Every year I come back from SEC with a list of things we want to put into place. For me, it’s one of the more important conferences we attend. It helps us move the bar.”

- DAWN BRUMMET, COO, ORNL FEDERAL CREDIT UNION



## SYMITAR EDUCATIONAL CONFERENCE & TECHCONNECT (SEC)

This annual event is very popular with credit unions. The last SEC included 3,400 credit union leaders, representatives, and technology partners. Because openness and third-party integration is a hallmark of the Symitar platform, even vendors with competing products are welcome. Attendees can find everything from roundtable discussions and product demos to educational and feedback sessions – on top of networking opportunities and social activities.

## REGIONAL USER GROUPS

There are three independent, self-governing user groups that were formed by credit union employees: SymEast, SymCentral, and SymWest. Described as smaller-scale Symitar educational conferences, they each have annual all-volunteer events that provide a rich source of networking, informative educational breakout sessions, vendor showcase events, and peer-to-peer sharing of all types. There are opportunities to volunteer and provide leadership, to speak on a topic, or to help plan and organize the event. User group meetings give everyone an opportunity to express ideas and opinions.

## SYMITAR NETWORKING FORUMS

In addition to the regional meetings, there are many annual meetings within a smaller geographical area. It’s not unusual for them to be held onsite at a participating credit union. These are funded, coordinated, and organized by Symitar with the assistance of a host credit union. The agenda is based on client feedback and requests for topics – it is more personal and credit-union-specific than the user groups.

## POWERON® SCRIPT SHARING

PowerOn is a customization tool for Episys. At conferences and user group meetings, users exchange tips and solutions. Symitar also maintains an online repository where credit unions and vendors can post solutions for sharing or sale.



“When we wanted to handle Reg D differently than the core does, we found a guy in New York who said he had the right PowerOn code for us. We got it, and within two weeks we had Reg D up and operating the way we wanted it to run.”

- SAM JAMES, CIO, SHELL FEDERAL CREDIT UNION

## SYMITAR ADVISORY BOARD

Symitar always solicits and accepts feedback from clients informally, but twice a year there is an official forum for receiving comments and advice from credit union representatives. The Symitar Advisory Board consists of approximately 20 clients who meet once a year to give structured feedback on improving Symitar products.

*To sum up, our company and our credit union clients are a cooperative bunch. We love to interact and build on each other's successes. It's guaranteed that a Symitar credit union will have plenty of support, camaraderie, and a technology partner that really listens.*

For more information about Symitar®, call **888-796-4827** or visit **[symitar.com](https://www.symitar.com)**.