

## CASE STUDY

# SymAdvisor™ Helps Delta Community Credit Union Meet Its Goals



"I've worked with this core for a long time. The fact that someone could show me something new and wow me, that was unexpected. Their knowledge and professionalism were phenomenal."

- MATT KNIGHTON, VP OF CORE BANKING, STRATEGY, AND OPERATIONS  
DELTA COMMUNITY CREDIT UNION

There are times when an institution needs to take stock of its capabilities. For example, while working on a number of strategic objectives, Delta Community Credit Union decided that it really needed to "get under the hood" of its Symitar platform and understand its full potential. The Atlanta-based institution wanted to learn about all the capabilities of its core system to understand how it might help achieve both short and long-term goals.

The Credit Union chose to engage with SymAdvisor as a means to this end. SymAdvisor is the Symitar consulting service that provides deep expertise in the Episys® core system as well as in project development and management.

## REASONS FOR ENGAGEMENT

Matt Knighton is the Credit Union's VP of Core Banking, Strategy, and Operations. He explains that over the institution's 25 years of using Episys there had been a great deal of customization. "We customized to keep up with the changes that came with online banking, and later mobile banking," he said. As the Episys core was updated over the years, some of these customizations became harder to maintain and no longer made sense to keep. Improving this situation was one reason they employed SymAdvisor.

Another reason is that executive staff members at Delta Community wanted to better understand the full capabilities of the core system. They wanted to expand their offerings and needed to know that continued investment in the Symitar platform would support their needs.

"Our first engagement with SymAdvisor," said Matt, "was to take an overarching look at the system." Matt explained that many people in the organization weren't aware of all that Episys could do. "I knew there was a lot of potential we weren't leveraging. We looked to Symitar to help us get us where we needed to be."

Out of that engagement came a multi-year roadmap to use more of the inherent functionality of Episys. "Our motto was 'go native' and we used that to guide our decisions," Matt said. That meant using more of the capabilities built into the system. Matt said for each area of concern, they asked themselves if they were using the core to the best of its abilities. That helped guide changes as they moved forward.

## ACCELERATING THE PLANNING AND IMPLEMENTATION PROCESS

The initial SymAdvisor engagement at Delta Community showed them ways to get better results in their processes.

"We learned how much potential is out there," says Matt. Later conversations with SymAdvisor were designed to help with specific processes such as statements and fees. In these projects, the SymAdvisor offered significant advantages in project development and completion.

"It enables us to plan and drive solutions well in advance of the projects," Matt explains. "Now I can do a lot of prep work in advance and on behalf of partners in other departments. The SymAdvisor lays the foundation ahead of time, so we're ready to tackle projects sooner." He says that overall, SymAdvisors speed their time to market and enables the credit union to be more proactive.

"The team made sure we had what we needed. They were always willing to discuss and make sure we understood what they were doing."

- MATT KNIGHTON



## THE SYMADVISOR EXPERIENCE

Reflecting on his first use of this service, Matt said, "I was nervous at first about how they would interact with our teams, but it's been awesome. They [SymAdvisors] were well-trained, very professional, informative, and good-spirited." He adds that all the department members who worked with the SymAdvisors felt fully engaged, that they were being heard, and that their questions were answered.

"The support was very strong," Matt says. "The team made sure we had what we needed. They were always willing to discuss and make sure we understood what they were doing." As part of its service, the SymAdvisor team helps the Credit Union staff understand how to make best use of their knowledge and how to work with them to move projects along and improve the core system.

"The connection with the SymAdvisor team members quickly became more than just a remote business relationship," says Matt. "I never felt that they were just leaving us and saying, 'Good luck with that.' They were always open for questions and ready to help."



#### INSTITUTION

Delta Community  
Credit Union

#### LOCATION

Atlanta, GA

#### WEBSITE

deltacommunitycu.com

#### ASSETS

\$5.8 billion

#### MEMBERS

391,000

#### FOUNDED

1940



**Matt Knighton**  
*VP of Core Banking,  
Strategy, and Operations*  
Delta Community  
Credit Union

## GO TO THE EXPERTS

When asked if he would recommend SymAdvisor to other Episys credit unions, Matt responded, "I just did that about a week ago." He offered some advice for institutions considering a SymAdvisor engagement. "Get buy-in from the rest of organization first," he said. "They should be aware that the Symitar core can be leveraged to drive future innovations and efficient processes, and they should know how important SymAdvisor can be in doing that. The consultants have deep experience with the core. Whoever owns IT in the credit union should have a strong relationship with SymAdvisor to help strengthen their capabilities and help them efficiently meet their goals."

Overall, Matt was surprised at the level of knowledge he encountered. "I've worked with this core for a long time. The fact that someone could show me something new and wow me, that was unexpected. Their knowledge and professionalism were phenomenal." He summed up the experience this way: "If you are looking for something as simple as a few process improvements or as big as driving corporate strategy, the SymAdvisor relationship can be critical for the effort."



"If you are looking for something as simple as a few process improvements or as big as driving corporate strategy, the SymAdvisor relationship can be critical for the effort."

- MATT KNIGHTON

For more information about Symitar®,  
call **888-796-4827** or visit **symitar.com**.