Customer
Affinity Plus Federal Credit Union

Industry
Financial Services

Size
26 branch offices
450+ employees
More than $1.7 billion in assets

Location
Minneapolis-St. Paul, MN

OnBase Integrations
D+H UltraData core
CUBUS Solutions
RightFax
Teres Solutions SAIL loan processing solution
Android
iPhone

Departments Using OnBase
Enterprise-wide
- Human Resources
- Records Management
- Accounts Payable
- Accounts Receivable

"**Member service has been tremendously enhanced by workflow.**"

– Cary Tonne, technical project manager,
Affinity Plus Federal Credit Union

Case Study | Financial Services | Affinity Plus Federal Credit Union

Award-winning credit union uses workflow to provide superior service

The Challenge

Manually routing data and documents at Affinity Plus Federal Credit Union wasn't just expensive and risky – it impacted member service and inhibited growth. Storage and shipping costs were one thing, but when representatives had to call members back after they hunted down paperwork, Affinity knew things had to change.

Even though the Minnesota-based credit union had the OnBase by Hyland enterprise content management (ECM) solution, employees were mainly using it to scan and create electronic images of documents. Many departments were still relying on paper to drive processes. Affinity needed to find a way for employees to fully utilize the capabilities of OnBase that would provide value to members as well as staff.

That's when it turned to workflow.

The Solution

Luckily, the solution to Affinity's challenges was a simple addition to the ECM solution it was already using. OnBase stores and manages Affinity's documents in a central repository that gives anyone with the proper rights the ability to find what they're looking for with a few mouse-clicks. To operate even more efficiently – and spend as much time as possible with members – Affinity added workflow, a way to automatically route electronic documents and information through processes.

Workflow improves member service by speeding processes and increasing accuracy, while reducing turnaround time. It also gives Affinity consistent business practices, ensures accountability and the helps the organization comply with evolving regulatory requirements through increased visibility.

OnBase®
by Hyland

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>
> – Cary Tonne, technical project manager, Affinity Plus Federal Credit Union

"Member service has been tremendously enhanced by workflow," says Cary Tonne, technical project manager at Affinity.

Starting slowly, Affinity implemented workflow in two departments – Human Resources and Financial Accounting – where the credit union uses it for verification report tracking. Affinity also utilizes electronic signatures, so members securely sign documents within the system, speeding processes, minimizing risks and cutting printing and shipping costs.

Since the initial deployment, workflow has become so valuable, Affinity has rolled it out across the enterprise. In the Records Department alone, the increased speed and accuracy gave the credit union the ability to redeploy 30 employees to member advisor roles, freeing them to focus on member service.

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Affinity also built a workflow designed to manage the entire lifecycles of leases and vendor contracts, giving it the ability to take advantage of potential discounts and renewal incentives before contracts reach their expiration dates. Now, Affinity has a reputation for speed, accuracy and excellent business relationships.

The Difference

Improves member service: Increased process speed and accuracy along with instant employee access to information means members receive quick, knowledgeable answers, enhancing service experiences.

Integrates systems: OnBase ties systems together – including Affinity's D+H UltraData core – so they automatically share information.

Optimizes processes, decreases costs: With workflow automatically routing documents and information through processes, 30 Record Department employees were redeployed to focus on member service. Shipping and storage costs also decreased.

Learn more at **OnBase.com/FinancialServices ››**

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