

Case Study



Allegacy Federal Credit Union

Thorough Planning, Collaboration and Technology to Change How Conversions are Conducted

The evolving situation surrounding the COVID-19 pandemic has informed and shaped our business continuity efforts. Faced with global travel restrictions, Fiserv successfully conducted a remote mock conversion for Allegacy Federal Credit Union.



There is no higher priority for the Fiserv family than the health and safety of our clients, associates, vendor partners and communities. To that end, we have encouraged a “travel by tech” policy that leverages the range of technologies and collaboration tools available for engaging virtually, in lieu of traveling for in-person meetings.



Situation

We recently had an opportunity to put our remote capabilities to the test by transitioning a multiday onsite mock conversion with Allegacy Federal Credit Union to a completely remote event.

In keeping with federal and state guidance designed to reduce the spread of the COVID-19 virus, Fiserv and Allegacy jointly decided to continue with the mock conversion remotely.

The implementation was well planned, but moving to a remote environment required some modifications to our overall command and control strategy, which included the following elements.



Client Profile

Based in Winston-Salem, NC, Allegacy Federal Credit Union is one of the largest credit unions in North Carolina serving more than 140,000 members worldwide with over \$1.3 billion in assets and an additional billion dollars in assets under management in its financial planning group. The credit union has 15 locations and eight high school student-run credit unions. Allegacy offers personal and business financial services to help a broad membership base including the employees, retirees and families of over 700 companies throughout the country.

Playbook

A comprehensive conversion playbook provided detailed project plans for both the client and Fiserv teams. It included all elements of the project including tasks, timelines and contacts.

- A process tool kept everyone informed of the project, regardless of where they were located
- Contact information was included for DBAs, developers and business analysts who were on-call throughout the weekend

The level of planning on the front end proved to be crucial to our flexibility in executing the mock conversion remotely.

Command and Control Line

A help desk was created for executive briefings and strategic discussions.

- Staffed 24/7 during the mock conversion
- All key personnel from data center to programmers were available throughout the weekend to answer questions, troubleshoot and provide guidance
- Remained open throughout the week, from 7:00 a.m. to 5:00 p.m. daily

Virtual Workstreams

A WebEx bridge was established for each major project team.

- Created for deposit accounts, loans, operations and finance teams to communicate and collaborate
- Ensured communications were clear and teams were focused
- Provided clients with immediate access to Fiserv associates for guidance – as if they were in the same office
- Allowed the Command and Control Line to remain open for executive briefings and strategic discussions

Challenge

Pandemic travel restrictions threatened to interrupt an onsite mock core conversion at Allegacy Federal Credit Union.

Solution

By leveraging the best collaboration tools available and comprehensive planning, Fiserv transitioned the multiday onsite mock conversion to a completely remote event.

Key Features

- Well-developed playbook ensured the credit union and Fiserv teams were informed of each phase of the conversion
- Dedicated command and control process kept everyone informed and the project moving forward
- Virtual workstreams allowed each major project team to collaborate effectively
- High-level executive meetings ensured leadership was engaged and confident

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High-Level Meetings

Executive level check-in meetings between the client and Fiserv ensured leadership was engaged and confident about the progress of the project throughout the entire mock conversion.

Summary

By establishing a clear command and control process and leveraging some of the best collaboration tools available, Fiserv successfully conducted the mock conversion in a completely remote manner. "Our remote mock conversion to DNA® went as smoothly as if the two teams were colocated at our facility," said Cathy Pace, chief executive officer of Allegacy Federal Credit Union. "The level to which my team and the Fiserv team used technology to execute the conversion was amazing."

The strategies and tools used to assist Allegacy will better inform Fiserv processes going forward will enable us to conduct remote mock conversions or go live events in the future. Planning is underway to continue remotely supported events until the imposed travel restrictions related to COVID-19 are lifted.



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