

Keep members coming back for more by connecting people, information and processes

“Members are everything to us. The number one benefit of OnBase is that it has helped us increase member satisfaction.”

– Sarah Lawson, IT specialist
Alcoa Tenn Federal Credit Union

The financial services industry is more competitive than ever, so you need every advantage you can get. Since members are at the heart of every credit union’s purpose, you need to be able to immediately find what you need to keep members happy. Find a way to improve member service – while keeping staff fulfilled and processes fast – and you’ve unlocked the key to future success.

That’s where OnBase enterprise content management (ECM) helps. By capturing documents and information electronically, you automate paper-based, manual and repetitive tasks, so your staff is free to focus on providing superior service to members. OnBase easily integrates with almost any core banking system, so your credit union can rely on it as a single application to store, manage and provide instant access to all types of content.

Improve member service

While core banking systems are necessary to do business, they don’t always integrate well with other systems and are limited to handling banking documents. That means they can’t manage operational, back office and other member-related documents and information, which are extremely important to everyday business.

With OnBase, you tie systems and processes together to share information across your credit union. Employees have immediate access to documents and information right from your core system. Instead of making members wait while they search through file cabinets and file shares or have information faxed to them, employees have time to engage members and talk about new products and services. It also frees employees so they can catch up with members, which is one of the reasons they chose your credit union in the first place – because they know you and trust you.

By reducing your dependency on paper, you meet your members’ needs faster and more securely – from online transactions to in-person interactions.



The Payoff

- Improve member service
- Access documents from any core banking platform
- Automate document retention
- Mitigate risks

Consistent records management made easy

Tracking and controlling the massive amounts of paper that move through your records department every day can be challenging. Credit unions are built on a foundation of financial forms and documents, but managing this information can get in the way of providing members the best service possible.

With OnBase providing instant access to information, your speed and accuracy gives you a competitive advantage. Not only does it allow faster access to information, but it guarantees consistent and timely management and disposition of documents – ensuring compliance with evolving regulations, facilitating easier audits and preventing costly legal battles.

Share information across departments to shorten processes

Although they're not usually on the front line of member service, operations departments like accounting, finance and loan processing are vital to the success of your credit union. Unfortunately, because their processes rely heavily on paper, they're also susceptible to errors.

Thankfully, with OnBase you meet the needs of your credit unions and processes – regardless of department or document. No more lost or missing documents. No more passing paper back and forth. No more halted work because of floods, fires or other disasters – including theft.

Instead, regardless of what type of information you're looking for and what form it arrived in, it's all instantly available right on the computer screens of users with the right permissions.

Let your work flow

Adding further speed and accuracy, electronic document workflow automatically forwards accurate and complete forms through processes while alerting the right people when they've moved forward or been flagged for inaccuracies or incompleteness. Not only does going paperless give you a competitive advantage, you save money on shipping and storing documentation.

Credit unions use OnBase to electronically capture, process, access, integrate, measure and store documents and information in a secure, central location. And with time to focus on making members happy, they're an easy choice to do business with.

Now it's your turn.

Learn more at Hyland.com/CreditUnions.

OnBase
a Hyland Software solution