

CoastHills Credit Union improves efficiencies and gains valuable education with SymAdvisor™



CoastHills Credit Union

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Assets

1.8B+

Branch Locations

12

Founded

1958

Software Solutions

Symitar®, Symitar
Staff Augmentation
Services™, Symitar EASE™

Established more than six decades ago to serve the needs of military personnel at Vandenberg Air Force Base (AFB) in California, CoastHills Credit Union proudly supplies the entire Central Coast region today. Founded in a small trailer on Vandenberg AFB in 1958, CoastHills is now the second largest locally owned financial institution serving communities in their market.

From business and finance to technology and military experience, the credit union's leadership brings diverse skillsets to the table. But with their many decades of growth has come both opportunities and challenges, according to Mark Cordes, VP of Project Management.

“Over the years, we'd found that our growth had really outpaced our processes,” Cordes recalls. “Inevitably, by default, we've just thrown head count at problems a lot of the time. But our leadership team has really embraced technology today, and they've emphasized for us to get more sophisticated with our processes.”

The credit union turned to Jack Henry™, instituting initiatives like SymAdvisor consulting and professional services as well as Symitar Staff Augmentation Services.

“Through the years, we almost customized ourselves into a corner,” explains Cordes. “As new technology is deployed, it's been very difficult for us to engage and build that product stack. Ultimately the goal is to allow natural attrition to take place, and we'll right-size as an organization as we build efficiencies with the core and our processes. Engaging with the SymAdvisor and the Staff Augmentation services was to ensure we're refining processes and utilizing the full functionality of the core.”

Jack Henry's SymAdvisor services offer flexible programs and specialized knowledge of the problems many credit unions are facing in today's market. Working with SymAdvisor consultants, credit unions can increase efficiencies by gaining a clearer picture of their entire system and organization. SymAdvisors spend time getting to know the credit union's processes and how those processes flow throughout the whole organization. They can then help support the organization's strategic goals.



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Mark Cordes

VP of Project Management,
CoastHills Credit Union

Credit unions can partner with SymAdvisors for one-off projects or a variety of staffing augmentation scenarios to gain extra expertise and support.

In CoastHills’ case, a SymAdvisor initially came to their credit union to spend a week in-house reviewing all their departments processes, understanding how they are leveraging their core and outlining opportunities for efficiencies. The credit union then chose to pursue the Staff Augmentation option, which paired a SymAdvisor with CoastHills Credit Union.

“Our CEO is a former CTO and has a technology background,” notes Cordes. “He was an advocate for Jack Henry and this process, which allowed us to have a champion on the leadership team. I really felt it was important for them to understand the opportunities and the benefits from us doing this engagement.”

Another important step in making the credit union’s SymAdvisor engagement a success was the effort made to gain buy-in from decision-makers and other key stakeholders, explains Cordes. “We started with our executive leadership team (ELT), but then we also went down through the reporting lines – speaking with managers and staff members.”

He continues: “Early on, I got the opportunity to meet with our ELT. I was also asked to participate in a manager meeting to explain what Staff Augmentation is, and what it really means. Making a concerted effort to break down some of those barriers to change, overcome the fear, and help create an understanding of why we want to add efficiencies. We really just wanted to make the credit union a better place to work through the processes that we use.”

Another crucial factor for CoastHills was keeping the buy-in going throughout their engagement. “Other priorities tend to come up, and there are pain points that end up right in the face of staff members,” Cordes comments. “Making sure we had a plan and a mode of communication to celebrate the project’s progress has gone a long way. We really wanted to emphasize and calculate our return on investment. How many hours did it save our employees? And then shout that news from the rooftops. Because as you go along during a 9-12 month engagement, you have to continually get buy-in from the leadership team and staff. What’s really benefitted us is showing the positive impacts from this process.”



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Mark Cordes

VP of Project Management,
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And the biggest unexpected benefit the credit union has gained from working with a SymAdvisor?

“Simply put – education,” Cordes observes. “I think this benefit came as a bit of a surprise to me, but it was educating our front line staff on functionality of the system. And then to take it another level further, we brought our SymAdvisor together with our software development and programming team. Now there are some great minds in that group, but even they gained some new insights on how to do things. That was a completely unexpected benefit. It’s one of those things you can’t quite tangibly calculate, but it’s been a huge resource.”

Finally, Cordes has great things to say about the SymAdvisor and Staff Augmentation experience overall.

“Our SymAdvisor and the SymAdvisor team have been willing to work with us in any capacity,” he concludes. “Our SymAdvisor is now an honorary employee of CoastHills. Throughout the process, we were set up for success though smaller implementations – the quick wins along the way that created efficiencies and led to us saving 30-40 hours a year per department. Then those wins help support the larger goals.”

“I’m always willing to brag a little about our SymAdvisor,” Cordes adds. “When she leaves, I know our organization is going to be left in a better place.”

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