

SchoolsFirst FCU reduces  
workflow processes **from**  
**hours to minutes.**

## The Story

SchoolsFirst Federal Credit Union, an 860,000+ member, \$15B credit union based in Southern California, has continuous goals of efficiently serving its members.

SchoolsFirst FCU had successfully deployed 100 recyclers across their branch network over the years. Like many large financial institutions, they faced some challenges in integrating their machines with their core systems.

Tellers had to switch between two platforms to process a cash transaction through recyclers. Because each type of machine had a different interface, the result was more confusion and more work for tellers. Disconnections and downtime with the machine network also left the branch team unable to access cash until the machine could be fixed by IT; which meant hours of support calls and troubleshooting.

SchoolsFirst FCU wanted to upgrade its existing fleet to newer recyclers that better fit their needs, but their current integration didn't support the recyclers they needed. In order to do so, they needed to find a more fluid integration between their devices and core platform, Symitar.

SchoolsFirst FCU found the right partner in Kinective, which seemed to have everything they were looking for, vendor-agnostic integrations to their core, reliable network connectivity and redundancy, and useful analytics. It was clear they would be able to buy the recyclers they knew would work for them and the connection would be seamless.



## The Details

Location  
Southern California

Core Provider  
Jack Henry Symitar

Teller Application  
Episys

Project size  
100+ recyclers  
across 45 branches

Asset size  
\$15 billion

“When we first started our search, we didn't even think a company like Kinective existed. Now, we consider them a strategic vendor and are delighted with the results they've delivered. Their team is well informed, innovative, and capable of executing on ideas. I would fully recommend them to anyone as they have proven to integrate well with our core systems and our retail strategy.

Lead Data Engineer  
SchoolsFirst FCU

## Product & Services



Teller  
Workflow  
Solutions



Data  
Analytics

## The Results

In 2015, the SchoolsFirst FCU team started testing S4+NORM, and iQ in a handful of branches. Then shortly after seeing success they began their full roll out to all 45 branches in 2016.

With more than 100 machines and multiple teams that needed to be coordinated, the transition seemed daunting. However, the Kinective team's responsiveness and thorough documentation helped ease their transition, and the full conversion process was finished in just four months.

As SchoolsFirst FCU switched each branch to the new system, they found an unexpected benefit: The need for intensive team training became almost completely unnecessary due to the intuitiveness of the Kinective integration with the core system.

No matter which branch or machine a team member is at, they're able to recognize what to do because the interface is now consistent everywhere. SchoolsFirst FCU tellers also began saving a significant amount of time each week—spending just 15 minutes closing out for the day with the new system by Kinective, when it used to take them an hour or more.

Their branches are also experiencing less downtime from network and machine issues. But NORM has solved these issues with building network viewable machines. Now if the network has an issue, NORM stores transaction data until the network is restored, allowing the branch to operate as usual.

Before integrating with Kinective, fixing issues with cash machines usually required outside assistance and significant time. But now, branch staff is able to use the built-in error handling to solve most issues themselves—sometimes in just a few minutes.

SchoolsFirst FCU also has greater visibility to what their cash machines are doing now, thanks to iQ. The software allows the Credit Union to refine their cash orders and detect unhealthy devices earlier, which both translate to greater business efficiencies and better member experiences.

Going forward, SchoolsFirst FCU is well equipped serve its members efficiently.

# 100s

of  
recyclers

# 1000s

of dollars  
and hours saved

# 0

need for intensive  
team training

“When we look to make changes in the branch, it's always a question of what makes the most sense to best serve our members. We introduced cash recyclers because we saw they value they offer, but felt held back because the machines didn't integrate well with our core. We needed to replace the integration we currently had, give us operationally what we required to run our branches more effectively, allow for better choice in market technology, and give us a platform that helped us deliver our retail strategy. Kinective did all four for us!”

Lead Data Engineer | SchoolsFirst FCU

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