

BUSINESS NEED

CME Federal Credit Union (CME) provides banking services to 26,000 members from multiple branches located throughout Ohio. With a highly distributed workforce, it is critical for CME to have a centralized online tool for employees to access business intelligence data; store and manage documents and forms; share calendars and contact information; and collaborate on projects. While CME had a HTML-based intranet site, the site lacked collaboration tools, contained only static content, and did not integrate with other business applications. It was difficult for employees to find relevant, up-to-date content on the intranet, and as a result the site had low usage rates. CME sought to transition this static intranet site to a more collaborative and dynamic portal that would integrate with other business applications, enable employees to create and collaborate around content, and notify employees when portal content was added or updated. CME believed that such features would not only increase intranet usage but would also boost employee productivity, enhance member service and improve financial operating results.

SOLUTION

To create a more collaborative and dynamic intranet site, CME selected Microsoft Office SharePoint Server 2007 (SharePoint) and NewsGator Social Sites. SharePoint enabled CME to create a corporate portal with individual sites for each department or branch. SharePoint provides CME employees with collaboration tools such as wikis and blogs; a content publishing and management system; shared calendars; a consolidated contact database; automated workflows; and centralized access to business application data. Social Sites integrated seamlessly into SharePoint to enhance portal usability, to enable easy discovery of content and people within the portal, and to bring fresh, relevant content into the portal. With Social Sites, CME employees see only new items when they are visiting a SharePoint Site. Employees can quickly browse through the latest content headlines, view the most relevant/popular portal content, and easily learn about authors' expertise. Social Sites provides CME employees with advanced tagging features and tag clouds so that they can categorize and locate information within the portal. In addition, Social Sites offers sophisticated RSS feed subscriptions and management features that CME can use to bring relevant, external news and information into the portal. And when CME employees are away from the portal, Social Sites' advanced RSS features can be used to send portal update notifications or important business application data to the employees' mobile devices, desktops or e-mail clients.

RESULTS

With the combined Social Sites and SharePoint solution, the benefits and business results realized by CME include:

- A time savings of 30 minutes per day per employee
- Increased usage of intranet/portal
- Reduced risk of non-compliance with Department of the Treasury banking regulations
- Improved financial operating results
- Enhanced customer service
- Superior access to timely, relevant business information via employees' preferred locations – portal, mobile, desktop, or e-mail
- Better informed employees that are more knowledgeable of products, services, and corporate policies and procedures



Case Study Highlights

Company

CME Federal Credit Union

Industry

Financial Services – Banking

Business Need

Enhance Intranet Functionality & Increase Intranet Usage

Solution

NewsGator Social Sites & Microsoft Office SharePoint Server 2007

Results

Time Savings of 30 Minutes Per Day Per Employee & Increased Portal Usage

SAMPLE USE CASES

The types of applications and features that CME was able to deploy with their Social Sites and SharePoint solution include:

Currency Transaction Report Application

Department of the Treasury regulations require that all financial institutions file a Currency Transaction Report (CTR) for transactions over \$10K. To ensure compliance with these regulations, a CME employee used to perform a daily review of every transaction from every branch. This review involved pulling reports from CME's line of business application and manually reviewing over 50 printed pages of data to find transactions over \$10K. CME now pulls this data from its line of business application directly into SharePoint and uses Social Sites RSS feeds to automatically notify the compliance employee of any transaction over \$10K. This automated process saves a significant amount of time and leads to more accurate reporting thereby lowering CME's risk of being fined or penalized for non-compliance with Department of Treasury regulations.

Rates Application

Using Social Sites' RSS feeds, CME management is able to subscribe employees to a feed that delivers automatic, real-time updates each time loan or deposit rates change. These feeds ensure that branch employees always have the most current rate information and enable the bank to respond more swiftly to market changes thereby improving financial operating results.

Member/Customer Service Management System

When a member has a complaint or concern, branch employees record the information in a SharePoint list and use the category field to designate the concern type. Social Sites automatically creates a tag from this category field. These tags are then displayed in a tag cloud to give CME management a real-time view of member concerns. Instantly surfacing such information enables CME to enhance its already exceptional service by immediately involving the right internal resources to more quickly resolve member concerns.

Wiki Based Policy & Procedure Documents

CME now creates policy and procedure documents using SharePoint wikis. This enables CME to determine when an individual section or page has been added or updated. Then, using a Social Sites RSS feed, employees are automatically notified of new content and presented with just the updated portion of the document. Such features improve employee productivity and help ensure that employees are informed of new corporate policies and procedures without being inundated with e-mails.

ABOUT NEWSGATOR SOCIAL SITES

NewsGator Social Sites drives Microsoft SharePoint Server adoption, improves productivity, and expands employee knowledge. Social Sites installs seamlessly into the SharePoint architecture to provide enhanced social computing and Enterprise 2.0 collaboration capabilities to SharePoint users. Social Sites keeps SharePoint content fresh and relevant, enhances SharePoint usability, makes it easy to discover content and experts, and brings users back to SharePoint through precision notifications. Social Sites features include advanced tagging; tag clouds; RSS feeds, subscriptions and management; notifications; read states; and colleague tracking capabilities.

"Social Sites was the ideal solution to enhance SharePoint's capabilities and to drive SharePoint adoption. With the combined Social Sites and SharePoint solution we have increased intranet usage and helped employees realize an average time savings of 30 minutes per day."

Joe Toth

AVP, Information Technology
CME Federal Credit Union

ABOUT CME FEDERAL CREDIT UNION

CME Federal Credit Union serves nearly 26,000 members and manages nearly \$158M in assets. Based in Columbus, Ohio, CME was established in 1935 to serve firefighters, police, and other city, county, and municipal employees. In 2002 CME was awarded a community charter from the National Credit Union Administration and since that time the credit union has expanded to serve all individuals that live, work, worship, volunteer or attend school in Franklin County, Ohio. CME's mission is delivering banking solutions that build valued relationships with its members. CME provides the financial tools to take members' lives from good to great. For more information visit www.cmefcu.org.