



CASE STUDY

Charter Bank Chooses JHA Client Services ConsultingSM for Global Security Implementation

"Having a consultant assist with the project saved us time overall and ensured accuracy and better ongoing support. It's well worth the dollars, in my opinion."

Erik LeMay, CIO
Charter Bank

Institution:
Charter Bank

Location:
Eau Claire, Wisconsin

Website:
www.charterbank.com

Assets:
\$863 million

Founded:
1980

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Erik LeMay, CIO

Charter Bank, based in Eau Claire, Wisconsin, wanted to begin using the SilverLake System® Global Security module. To ensure a successful implementation, the bank employed JHA Client Services Consulting. Erik May, CIO, describes the bank's experience.

Jack Henry Banking (JHB): Why did you engage with JHA Client Services Consulting for this project?

Erik: Moving to Global Security was recommended prior to our move to Xperience™ [a customizable user interface]. While we felt we had a pretty good handle on permissions, we wanted to move to Global Security to have more permission control and a better way to manage employee changes such as new hires, internal moves, and terminations. Rather than winging it, we wanted to take a hard look at who needed access to what in Silverlake and build it appropriately the first time. We reached out to JHA Client Services Consulting for this.

JHB: Did you consider other options before deciding on Jack Henry's services?

Erik: We considered doing the work ourselves. As we dug in a bit, we found that the risk of doing it incorrectly outweighed the cost of the consulting engagement.

JHB: What was your experience working with our JHA Client Services Consulting group?

Erik: Working with our consultant was very smooth and straightforward. She's obviously an expert and did a great job getting us prepared for her onsite visit so we could effectively use the time we had with her. It was nice to have a subject matter expert ask the right questions at the right time to ensure we had a quality implementation.

JHB: Can you describe the Global Security implementation process?

Erik: Our consultant provided the agenda and asked questions to understand our current environment and how Silverlake permissions had been handled to date. She then worked with us to build a plan to ensure that all departments were represented during the discovery week, which was the first week of the engagement. She took the feedback from the discovery and built our profiles. Next, she came back onsite and trained every bank employee on Global Security and then provided administrator training for the IT group, which handles the authorizations. When she was done with the second onsite week, we had pretty much everyone live with Global Security.

JHB: What was your experience immediately after the implementation?

Erik: While onsite, our consultant knew the right questions to ask to ensure the teams had what they needed. This made the post implementation support much easier, as we weren't needing to put out multiple fires. Having an expert who has worked with the system for a long time and with many other financials provided a lot of great insight as to how "it should work" and how others were handling any unique situations we were encountering.

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Erik LeMay, CIO

JHB: Were any changes made to your bank's procedures based on the implementation project?

Erik: We received some suggestions on best practices for processes and "who does what" at the bank. The insight was welcomed and beneficial to bank operations. We made some processes more efficient. Moving to Global Security came at a great time due to some staffing changes internally, and allowed us to understand the process and risks we were taking in certain areas related to security. Having groups and templates set up makes adding and changing users much easier and is much more efficient.

JHB: What benefits have you gained regarding user access?

Erik: Changing to Global Security allowed us to understand in more detail what everyone had, and made it easier to create groups and templates. We can add functions as needed and not just give someone access year-round for something done once a year. As employees come and go, Global Security makes the process of updating their permissions much smoother and easier to manage.

JHB: Was there anything about the engagement that exceeded your expectations?

Erik: Our consultant did a great job working with the employees and asking the right questions. Her knowledge of Global Security, Silverlake, and bank processes in general allowed her to make the meetings with the different departments quick and painless, yet still give them all the access they needed.

JHB: What would you say to other banks that are considering the use of JHA Client Services Consulting for Global Security implementation?

Erik: We have found that the onsite consulting from Jack Henry to be worth the expense. It's a valuable resource both while onsite and after. To me, it came down to being able to complete this project and complete it well. I didn't want to risk having to scrap what we might have done internally and then still pay for a consulting engagement. Having a consultant assist with the project saved us time overall and ensured accuracy and better ongoing support. It's well worth the dollars, in my opinion.