



CASE STUDY

SilverLake Xperience™ Client Services Engagement

“Our employees are happier because their work is easier. They are more efficient and can answer customer’s questions quickly and see everything at once...”

Sue Ozburn
EVP, Chief Information Officer
Cashmere Valley Bank

Institution
Cashmere Valley Bank

Location
Cashmere, WA

Website
www.cashmerevalleybank.com

Assets
\$1.5 billion

Founded
1932

SilverLake Xperience Client Services Engagement

Customizable user interface for the SilverLake System® and integrated complementary solutions



Jack Henry Banking (JHB): What were your primary reasons for moving forward with a Client Services Engagement?

Sue: The implementation of JHA's Xperience is a major change for ALL employees and we treated the implementation as serious as a core conversion. The setup of what the screens should look like, and what is needed by each job role throughout the company needed careful consideration. All employees needed to be trained to find information and why the system is better.

"Now, the new employees (and the training staff) are very happy with the training process."

Sue Ozburn

JHB: Tell us how the Client Services Engagement...

- 1. Worked with your bank staff to generate results.**
- 2. Positively affected your goals.**
- 3. Improved day-to-day operations and/or operating efficiencies.**

Sue: We wanted a new and more efficient way to get our jobs done. Many of our staff didn't actually know what they were doing, they only knew the menu options they took to get something accomplished. Now they better understand what they are accomplishing.

Our employees are happier because their work is easier. They are more efficient and can answer customer's questions quickly and see everything at once, without having to jump around and take different menu options. Our goals included gaining efficiency and we more than accomplished that...also a goal was better training for new employees. I meet with all new employees a couple days after they start work and a common question was always, "How old is your system?" because green screens were not something younger people had ever seen before. Now, the new employees (and the training staff) are very happy with the training process.

JHB: Did Client Services Engagement meet your expectations? Exceed them?

Sue: Yes, the depth of knowledge of those who came on sight far exceeded what we had expected. And, the amount of work we did together extended far into evenings and they did a great job.

JHB: Would you recommend a Client Services Engagement to other banks? If so, why?

Sue: Take the conversion to Xperience seriously and use the tools provided by JHA. Yes, there is a cost associated, but it will be done right. And, take their advice and don't just recreate what you already have – make it better!