

IntelliEnterprise Boosts Advancial's Productivity and Employee Satisfaction

In 1937, Advancial Federal Credit Union opened its door with seven members and \$35 in assets. Seventy years later, they serve nearly 44,000 members and have grown to nearly \$600 million in assets. While their numbers have increased, their commitment to personalized service remains unchanged.

Advancial invests heavily in getting to know you as an individual, before any financial discussions ensue. But as business expanded to 12 branches in three states, their 120-person workforce began to feel like they didn't know each other. Employees didn't have any idea what colleagues looked like, nor did they understand each person's role in the organization.

At headquarters in Dallas, Texas, IT Business Systems Analyst Craig Sheffield began his search for an Intranet solution when their CEO uncovered (through personal interviews with every employee in the company) that better communication was key to improving employee satisfaction.

"Companies are beginning to realize that information sharing is critical to business. Our number one goal was to make remote employees feel like they're a part of the corporation, and the most requested feature was to be able to see other employees," says Sheffield.

Overall, Sheffield says they needed something that was easy to use and manage. "We wanted something that was simple to navigate, easy to contribute to and update, to be able to quickly find information, and easy to access – without requiring users to remember additional passwords."

A Home-Grown Solution Leaves Employees Wanting More

They had developed a home-grown HTML solution but it became too cumbersome to maintain and lacked the latest enhancements in technology. Only two users could upload content. Not all branches and departments had a site presence. There was no search engine, no central navigation, no security levels, and no unified look or feel.

Advancial had familiarity with one of the better-known Intranet products on the market, but while it was sufficient for a collaboration project, Sheffield says "it wasn't very intuitive to use, and it lacked features we needed."

Distributed Administration and Active Directory Integration Add Up to Low Maintenance

Advancial needed a tool that would be easy to maintain, and that didn't require additional staff to support it.

“Distributed administration and integration with our Active Directory were important. We wanted to build off of what was already there, and that included single sign-on.”

Distributed administration, Sheffield believed, would also help keep content relevant and current. With the home-grown solution, only certain content was published, so people had to look in a lot of different places (e-mail, network drives, local drives) to find what they needed.

Information Sharing, Strong Search Capabilities, and Security all Musts

Employees used to send e-mail attachments to share information with colleagues. “Peoples’ mailboxes were weighted down with these large attachments, and often times multiple copies of the same document were re-distributed to the same people,” says Sheffield.

Now there’s one single source for information, and you don’t have to manually hunt through directories. “IntelliEnterprise’s strong search engine with various filters and ways of searching for information was a big selling point. The tag clouds and tag lists make it very easy to find the information we need.”

Advancial also wanted to control who could access their information. “We wanted to make sure you could only see what’s relevant to you,” says Sheffield, “and you didn’t see things that you shouldn’t be looking at. IntelliEnterprise’s search engine will search all locations, but only show content *if* the person is has permissions to see it.”

adenin’s Customer-Friendly Website a Refreshing Change of Pace

A Google search brought adenin to Sheffield’s attention, and what immediately impressed him was the customer-friendliness of the site.

“Other competitors are very tight-lipped with their information,” says Sheffield. “There are very few screen shots, and little detail. In contrast, adenin allows you to sign up, build your own site on the web, or download the software locally.”

Even pricing was readily available online. “There were no playing games, and I didn’t have to sit through long-winded sales pitches to know what it would cost.”

And, Sheffield says, “It was a bonus to be able to play with IntelliEnterprise on adenin’s site. It was a great communication tool that helped me get buy-in from Advancial’s executive team. I could quickly build a site and demonstrate it, they could then ask questions, and I could make changes to show them how IntelliEnterprise’s different

features could work for us.”

IntelliEnterprise Wins Hands-Down on Features, Customization Options, and Price

“There really was no contest,” says Sheffield. “I used a matrix of requirements to size up the four top vendors, and IntelliEnterprise won hands down. It had the most features right out of the box. Its portlets and tools like the application builder allowed us to plug in functionality and customize without having to do a lot of programming. And the price was straight-forward and reasonable.”

Five Months from Inception to Launch

Because Sheffield was able to play with IntelliEnterprise on adenin’s website, he says they pretty much had their basic structure figured out prior to purchase. The whole process – from product research and evaluation, to purchase, install, setup, and launch – took just five months.

Adenin came on-site for one week to help Sheffield install and configure it. “Our CIO wanted to build a robust, fail-safe system, so instead of doing a remote setup, we opted to have them on-site. It was great, because we got to learn more about the company, and adenin gave us every confidence that the software would work right.”

It took just one person at Advancial to set up their entire structure and load the base content. They then trained content administrators from each branch and department to load additional content. “We’re a lean shop, so it’s good to know that posting branch news or photos isn’t an overwhelming task.”

Application Builder a Powerful Tool

Sheffield views IntelliEnterprise’s application builder as their strongest feature. “It’s a huge benefit,” he says, “to be able to build a database in a manner of minutes, share data, and control access to it.

“We used it to replace our service desk system for our I.T. department and then extend the functionality to our entire company. We built forms through the application builder – with workflows – so that every department and branch can submit requests and have complete tracking, not just I.T. We couldn’t have done this with our previous vendor as their license fees were too costly.” Their previous service desk system did a good job but by using the existing capabilities of IntelliEnterprise, they now can save thousands of dollars each year in licensing and maintenance costs.

Sheffield also said that the application builder fits right in with employee satisfaction. “We’re adding in employee surveys so we can get direct, real-time feedback on how employees are servicing others. These surveys will tie directly into the service desk system, allowing people to rate the service they received immediately after their request is closed.”

Collaboration is Biggest Improvement

The biggest improvement, according to Sheffield, is that everyone has a greater awareness of the roles and responsibilities at each branch and department.

Before, employees didn’t know who to go to for certain tasks. Now when an employee needs something, they can open up a task, and inside it find everything they need: A link to the request form, instructions on how to fill it out, and contact information for the person responsible for handling it.

Workgroups, Extranet, and More Customized Tools on the Horizon

Sheffield says Advancial’s leadership team already uses IntelliEnterprise to collaborate. “Our leadership team uses IntelliEnterprise for their leadership meetings, and as input into board meetings. And with its security features, nobody except the leadership team knows it’s there. We’d like to extend this further, by connecting our Intranet to an extranet that our board members can access.”

Sheffield also likes IntelliEnterprise’s workgroup capabilities. “I look at these as mini-websites that teams can fill with their own documents, calendars, task lists; everything a committee or project team needs to be successful. And again, visibility to these mini-sites is controlled through user permissions so you’re not cluttering up the site.”

Project managers are starting to work within the databases, too. “We actually started to evaluate a product from another company that does nothing but project management, but it was overkill. There were too many features and too many details we’d have to put in to make it work. Now we’re developing our own project management solution in IntelliEnterprise, and that’s going to save us a lot of money while getting us exactly what we need.”

A Tool that Never Gets Old

Sheffield says Advancial is a company that pushes software to its outer limits. “We hear a lot from our vendors, ‘Well, no one has ever done that before.’ We ask a lot of our software vendors, and we like a lot of customization. With IntelliEnterprise’s tools and portlets, we knew the system could be molded to fit our needs.”

And, he says, it's good to see that adenin is in constant development, always listening to their customers for ways to improve. "Seeing the number of releases adenin comes out with – and what they're doing with the product – makes us feel good about our decision."

With IntelliEnterprise, Sheffield says he finds something new to implement each week. "This is one of those projects that never ends. That's a good thing, because it doesn't grow old. It doesn't get stagnate. It keeps everything fresh, and it keeps providing additional benefits to our employees."