

Kirtland FCU gains efficiency with streamlined content management



Address

Albuquerque, NM

ContactGeorge Walker,
Chief Information Officer**Website**kirtlandfcu.org**Assets**

\$972 million+

Accountholders

49,000+

Founded

1958

Compared to the solution we previously utilized, the Synergy Enterprise Content Management™ (ECM) solution from Jack Henry™ has helped us significantly improve from a security, automation, and ways of use standpoint,” says George Walker, Chief Information Officer of Kirtland Federal Credit Union (KFCU). “The out-of-the-box integration that’s offered with our Symitar® technology platform and banking-specific applications is unmatched.”

After 15 years with their previous content management solution provider, the lack of integration and functionality Kirtland FCU had been experiencing was the driving force behind their decision to change solution providers. “The absence of workflow and document tracking (combined with the lack of support for automated document importing and absence of other key components) played a critical role in our decision to find a new solution provider,” explains Walker. “When comparing options, the integration aspect was the number one reason we chose Synergy ECM by far. When looking into other solution providers, none of them offered the integration feature – meaning we would’ve had to develop integrations that Jack Henry already had built, which would’ve been very difficult and time-consuming for our small development team.”

Founded in 1958, Kirtland FCU has grown to be one of the largest credit unions in New Mexico, whose mission is to improve members’ economic well-being and quality of life. With assets over \$977 million, Kirtland FCU serves over 48,000 members from five branch locations in Albuquerque, NM. The credit union empowers members’ financial independence, providing powerful tools designed to simplify life by eliminating financial stress and giving members control to save and borrow smarter.

Kirtland FCU’s field of membership is one of the many characteristics that make it so unique – with a large portion of their mission and the pillars on which they were built going toward supporting the brave men and women who protect our country. The credit union has become a staple in their community by providing the means for financial success of these special members. Kirtland FCU was named in the top two credit unions in the state of New Mexico by Forbes and recently received the Credit



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Union National Association (CUNA) Louise Herring Award in the \$1 billion and under category for their “Service to Those Who Serve” program, which is dedicated to service men and women in New Mexico. Through this program, Kirtland FCU opened a new micro-branch inside the Kirtland Air Force Base Exchange to serve military members, families, base employees, and contractors – providing them with quick, easy, and convenient access to their finances and banking needs in addition to extended hours at the micro-branch.

“In regard to loading documents, checks, and statements, these processes are much simpler and less manual since implementing a more flexible and comprehensive ECM solution.” Walker goes on to explain his team has been able to focus more on core competencies, which has created a massive impact in terms of quantifiable labor savings, allowing Kirtland FCU to expand their branches. “Once document tracking is implemented, we expect to see a huge boost in efficiencies with missing documents for loans and accounts. And, when we build in workflows, we should see an even greater improvement in efficiency and agility within that arena as well.”

As Kirtland FCU enters its ninth year with Jack Henry, their feedback to other credit unions looking to implement a content management or document tracking solution is simple. “Each component of the implementation process went very well. From sales to implementation, everything we were promised – Jack Henry delivered,” says Walker. “Altogether, it was a smooth transition and the subject matter experts working with us from the Jack Henry team were all very knowledgeable and helpful. Our training sessions were great, as were our consulting pieces – both of which helped our team understand what we needed to know in order to achieve a successful implementation. You will be very happy with the solution and its functionality once implemented.”

Looking to the future, Kirtland FCU plans to put digital efforts at the forefront of their business operations while leveraging their existing platform and military values that shaped who the credit union is today. Having an open technology platform that allows them to enhance member experience and increase back-office operations will open the door to help even more members achieve their financial goals in the future.

connecting possibilities

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