How City & County Credit Union came away from their merger with the perfect Business Continuity Application

City & County Credit Union's (CCCU) Applications Analyst, Dave Lockman, wears many hats. When business continuity management was added to his already long to-do list, he took on the challenge and got certified as an Associate Business Continuity Professional. However when it came time to execute a Business Impact Analysis (BIA), develop a comprehensive plan, and manage the exercising and testing processes for the company, he realized he needed a tool that would streamline and hopefully automate a lot of his manual tasks.

With a mission to create a better system of care to serve their patients and community, they required a more sophisticated notification and alerting system to help hospital workers perform more effectively and efficiently.

Challenges

City & County Credit Union successfully completed a merger in January of 2019. This increased their employee count by 50% and brought their total assets managed to just shy of a billion dollars. Not only did employee numbers grow, but so did the number of systems and processes that needed to be evaluated and managed to comply with the National Credit Union Administration (NCUA) regulations for business continuity. Dave already knew that CCCU was using an extremely manual process to manage their business continuity plans, so he hoped that the company they merged with had a better way of managing these plans.

"Even though Business Continuity planning isn't my only responsibility, it becomes most of my job about 10% of the time," Dave said. "In order to conduct a BIA, I needed a lot of information from the whole team, and the only way I knew to record everything was to sit down with a few people from each department and interview them to learn what processes we needed to recover in case of an emergency. I would enter that information into my Excel document and publish a Word document with the processes and procedures I came up with. Needless to say, this took forever."

As the merger progressed, Dave learned that the company they were merging with was doing the same thing; manually recording information in Excel and Word and creating a report to the best of their ability when it came time for their yearly audit.

"It was surprising to realize that even though our industry is extremely regulated, neither of us had a formalized way to manage our business continuity and disaster recovery programs to ensure we were actually meeting those regulations. We were both relying on manual processes."

Dave knew that with all the changes happening during the merger, it was the perfect time to look for a tool that would allow him to develop, manage, and execute their business continuity planning so he could be sure they complied with NCUA regulations.

CCCU's challenges

50% ↑

- Increase in employees

- Increase in ASSETS

- Increase in systems & Processes

+ must comply with NCUA regulations

Solutions

To get started, Dave turned to a trusted source. He polled CCCU's auditors to see what they preferred. Although several tools were mentioned, BC in the Cloud (BCIC) was the number one choice he heard. He researched each application and attended several demos. After doing his homework, the answer was clear: BC in the Cloud had everything CCCU needed and more.

"It's not only about the features, although BC in the Cloud met all the requirements I had. It's also about the experience dealing with a company. Carey, my sales rep at BCIC, walked me through each step, answered all my questions, and never pressured me to buy. I felt like he genuinely cared that I was getting the right product for my needs. I knew BCIC was a company I wanted to do business with."

Dave found that BC in the Cloud was by far the most user-friendly application he looked at, which was helpful for him, while very beneficial for any new users in the future.

"I needed something technical enough to meet our needs, but also user friendly enough that it could be learned quickly. Eventually I will not be the only one using this tool so I wanted to make sure I could easily teach it to others."

Dave found that the implementation process with BCIC was great too. The rollout was done over a few weeks, according to CCCU's specific needs. Dave was given a dedicated implementation manager who walked him through everything and who understood that onboarding needed to be suited to his busy schedule.

"My Implementation Manager, Dawn, was amazing. She helped implement BCIC in a way that worked for me. She was extremely patient especially given that I am new to the world of business continuity. She was a wonderful teacher and really helped make sure I got everything I needed out of BC in the Cloud."

Another feature that Dave loves is the ability to easily pull reports that meet NCUA guidelines and can be used during their yearly audits. Rather than going through hundreds of cells in an Excel document and manually creating a report, Dave can set the parameters he needs, run the report, and be done in minutes.

Advantages

- Great implementation process
- EASILY PULL REPORTS
- Meet NCUA Guidelines

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Dave Lockman
City & County Credit Union's (CCCU)

"When our auditors request information I can get it to them right away. And they are always extremely happy with our reports. Whether it's risk assessments, BIAs or anything else, BCIC has made it super easy for me to take care of that part of my job. It's such a relief to know we are always audit-ready."

Dave also enjoys the training videos that were provided to him, which allowed him to learn some of the more advanced features on his own time.

Results

With BC in the Cloud, Dave and CCCU got everything they needed. They are able to meet regulatory requirements from the NCUA, they have a tool that was easy to implement, and they have the full support of the BCIC team should they ever need assistance.

"Overall, we are using the tool really well. The head of each department can go in and answer all the questions right in BCIC and I no longer have to interview each person and manually enter the information into Excel. BCIC allows me to easily do a Business Impact Analysis and Risk Assessment for each process. The organization it provides is amazing."

Dave finally feels confident that he can handle any issues that CCCU may face in the future. He is very happy to have found BCIC and he isn't shy about sharing his excitement.

"For a new person in this industry, working with BCIC has been fantastic. Whenever I go to a seminar or industry event, I tell everyone that will listen to check out BC in the Cloud!"

"It's great when I have down time to watch videos and understand how some of the more complicated features work. But I also know that I have support whenever I need it, which is very reassuring."

Dave Lockman
City & County Credit Union's (CCCU)

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