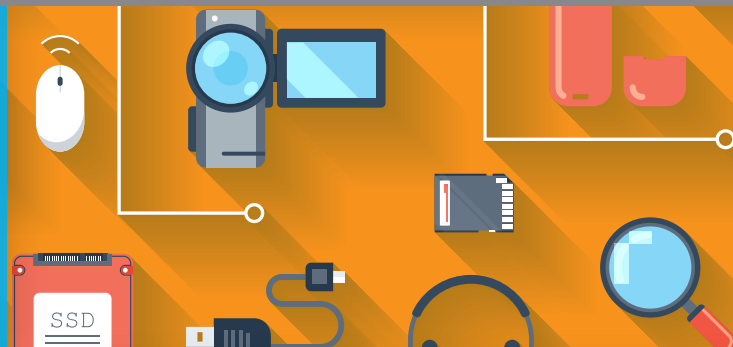


## A case study on business continuity for your imaging solution.

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### “We like the bigger receipts!”

Recently I visited a credit union in Northern Michigan along with Jim Lawrence, Manager of Disaster Recovery and Business Resumption Services here at CU\*Answers. This credit union had been working diligently for the past few years to move to an electronic process for their operations. Everything from teller line receipts to their lending and member services forms was being done electronically. When this particular credit union made the decision to go with an electronic imaging solution they didn’t “nibble around the edges,” they dove in head long. Furthermore, they did so by leveraging the CU\*Answers CUSO and engaging its experts to help them along the way. They conducted imaging strategy planning sessions, Records Information Management (RIM) engagements, and yes, business continuity planning. After all, once you have all your information in an electronic format on a server it begs the questions: What happens the day it goes away? How will I service my members?

This brings us to our visit. Jim and I were there to conduct a live business continuity test. Credit union management had engaged us previously to create a plan and now they wanted to test it—something we strongly recommended to them. We wanted to learn if the plan was a good one, if there was holes in it, or things we didn’t think about. We wanted to see if the credit union staff was confident and knew what to do, or would they be confused and get rattled in the absence of a critical tool that they counted on so heavily every day.

The test began by reminding the staff of the process. Then we removed the imaging server from the network. Immediately the staff fell back to their procedures for working offline and began helping members accordingly. Their fallback process involved printing paper receipts to a laser printer, then scanning them in later when the system was back online vs. automatically saving to the imaging system and printing to small thermal receipt printers that required the imaging solution’s specialized software. The result? There were smiles on the teller line, no angst, and members were serviced. The only comments from members... “We like these larger receipts!” Ha! That was one we didn’t see coming!

We made the system available again and after a brief retrospective we left the credit union to return to the office to do our follow up and write up, wrapping up Thursday’s activities. The story doesn’t end there though. The following Monday, one of the credit union’s branches lost its connectivity with the main branch where the server was located due to a communication line failure. The staff had lost their ability to print receipts and capture forms, but this time in an actual live incident and not a test. Without hesitating, the staff pulled their procedures back out and began serving members as if it was all part of the day-to-day.

The moral of this story is preparation, planning and practicing. Those are the keys to handling the unexpected. I have to wonder had we not done the test the week before how different that Monday might have been. Likely frustrated members and staff, all of which could have been prevented.

So now this discussion turns to you. Are you prepared? Do you have a plan? Have you tested it? Would your Monday be like theirs? If you answered no to these questions then I encourage you to reach out to our Business Continuity and Imaging Solutions teams to get a plan and practice it so you feel nothing but confident when that “fateful Monday” rolls around and the only feedback you get from members is... “We like the bigger receipts!”

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