

Deep IT analysis and outsourcing yield results for TruStar Federal Credit Union

RSM enhances IT approach to stimulate collaboration, service delivery and growth

Technology integration and utilization are critical measures of success for business in all industries. However, an organization's IT strategy must align with and support overall business goals in order to optimize processes and achieve long-term success. All too often, IT and the business operate in silos, creating inefficiencies and strategies that don't deliver on their anticipated value.

TruStar Federal Credit Union has been committed to the financial success of the residents of Northern Minnesota since 1960, growing from initially serving papermill employees and families to currently filling the needs of individual and business members across six counties. TruStar is focused on providing a better way to bank, and that includes utilizing state-of-the-art technology tools and solutions.

However, as the institution expanded and evolved, IT department processes became disconnected from overall business needs and goals. For example, while IT security is of the utmost importance at financial institutions, employees need a certain level of flexibility to perform critical tasks and keep up with member expectations for access and innovation. But internal users often experienced delays or denials because of security concerns when attempting to perform necessary functions or expand their use of technology.

"The user experience was challenging, with a lot of redo, reentry and a lot of hoops to jump through in the name of security," said RSM US LLP Director Jodi Rickers. "Ultimately, it was difficult for users to get their jobs done."

In addition, TruStar had fully redundant data centers with near real-time recovery when the business and departments only required recovery in four hours,

eight hours, or even a matter of days in some cases. At that point, IT was driving costs to support technology and not to support the needs and direction of the business as a whole.

"When talking to business units, they did not feel like they needed that speed of recovery," said Rickers. "So, their budget was much higher than it needed to be compared to what the business wanted and was willing to accept."

Change presents an opportunity

TruStar was approaching a major shift in leadership, as some senior leaders were set to retire and the outgoing president sought to provide a strong foundation for incoming executives with an understanding of any potential issues. While technology was a frustration and leadership felt that gaps existed between IT and the business, they did not have enough visibility into possible solutions.

TruStar had an existing successful relationship with RSM US and selected the firm to perform a technology and organizational assessment to detail how the business and IT worked together and what potential challenges and opportunities existed within their operations. The detailed assessment validated the institution's pain points and uncovered some previously unknown issues, with most centering on better alignment necessary between IT requirements and business needs.



TruStar President and CEO Kipp Raboin saw significant value in the assessment and its results. "We felt confident in spending the money and the resources to get that done," he said. "And heavens, it was worth it. It was a game changer for our credit union to move forth."

Managed services strategy delivers answers

After providing a deeper understanding of TruStar's IT and business alignment challenges, RSM suggested that the institution leverage RSM Catamaran's suite of integrated outsourced solutions to alleviate their IT concerns and enable leadership to focus on the overall business strategy. Based on the firm's experience and knowledge of TruStar's people, process and technology, stakeholders decided to expand their relationship and take advantage of RSM's FIT (financial institution technology) as a Service platform. Implementing FIT as a Service meant that the credit union received managed IT services, the RSM Defense managed security platform, cloud environment maintenance, regulatory compliance and more, all in one package.

With FIT as a Service in place and in motion, TruStar rapidly began seeing improvements and fewer barriers to productivity. For example, RSM Defense allowed TruStar to remain focused on servicing their clients because it accurately and effectively audited and diagnosed potential security issues while giving more access to business users and security team members to perform higher-priority tasks.

Further optimizing the IT environment

In addition, the RSM team completed several complex tasks that greatly improved TruStar's IT environment and alignment with business goals. This included rebuilding the institution's active directory, restructuring security from a switch environment to a Cisco Identity Services Engine (ISE) architecture and altering backups so they were more efficient.

Rickers detailed how key IT processes were conducted without disrupting operations. "We basically rebuilt the plane while it was flying," he said. "We did not take anything down that affected their ability to serve customers, but every time we refreshed something, their staff got more access to do their jobs without putting their environment at additional risk."

To enhance both security and efficiency, RSM implemented Microsoft Intune cloud-based endpoint management, automating a process that was previously managed manually. Overall, security principles and deployments have been rebuilt, with business functionality driving security configurations but without reducing security controls.

In many cases, TruStar had the right technology in place, but it was only partially or not effectively deployed. RSM broke their infrastructure down and built it back up with a cleaner modernization deployment that is more effective for the overall business.

"We brought the right amount of ingredients when they needed them," said Rickers. "Rather than coming in to simply replace everything, we came in to align technology to the business."

New strategy elevates operations and service

With a new IT perspective and approach, TruStar now has a stronger foundation to provide customers with a better way to bank, bolstered by technology. RSM's FIT as a Service has resolved the previous business versus IT culture and created a framework that is more conducive to enhancing service delivery and growth, with IT supporting and enabling the business.

"There's more of a spirit of collaboration and we've come a long way in the four years that I've been here," said Raboin.

Most importantly, that collaboration has enabled Raboin to limit concerns about IT and focus on the institution's overall operations. "It's been a great, great thing for us, and I appreciate the relationship we have with RSM. I consider them a trusted third party and they allow me to worry about running the credit union and not have to worry so much about IT. I feel confident that we've moved the needle."

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