Business Challenge

Employees of TFCU needed ready access to information in order to serve customers efficiently and in compliance with policies and procedures, but its intranet was difficult to search and manage.

Transformation

With a Base22 solution built on the IBM Digital Experience platform, TFCU employees and auditors have fast access to targeted, compliant information through a portal organized the way each user group consumes content. Now people have one source of truth where they can quickly find what they need and be confident the information is current and complete.

Chris Henkel
Vice President of Professional Development
Tinker Federal Credit Union

Solution benefits

50% decrease
or more in time required
for business content authors to create, revise and publish web content

Fast access
to relevant content
with searchable, role-based content for each topic accessible from one web page

Trusted
information
from a shared repository that authorized authors across departments continually update

Tinker Federal Credit Union

New employee portal supports knowledgeable customer service

Established in 1946, Tinker Federal Credit Union (TFCU) is the largest credit union in Oklahoma, serving more than 300,000 members worldwide. TFCU employs approximately 650 people at 30 locations across the state, including branch operations and corporate offices.

"It's amazing that we could go from ground zero to a user-centric portal in such a short time."

— Chris Henkel, Vice President of Professional Development, Tinker Federal Credit Union

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Content accessibility issues

Because Tinker Federal Credit Union is a knowledge-based organization, it is imperative that its employees have ready access to the information required to serve customers efficiently in accordance with policies and procedures. "We are very cautious and compliant with government regulations and take great care to document how we interpret and follow those requirements," says Renee Jones, Assistant Manager of Professional Development at TFCU. Over time, the growing library of documentation became increasingly difficult to search and manage through TFCU's intranet, which provided a sophisticated directory of linked content.

To continue effectively training employees, serving customers and supporting auditors, TFCU needed a searchable portal to retrieve targeted content buried within lengthy documents. "We envisioned a portal as a single source of the truth, which could be quickly accessed by employees and easily updated by the business content owners responsible for keeping their departmental information accurate and current," says Jones.

Blueprint for success

TFCU already had the technology base for a strong solution with its IBM Digital Experience platform, but it had no one in-house dedicated to web design or development. Tasked with deploying the employee portal, TFCU's professional development department contracted with IBM Premier Business Partner Base22, LLC for assistance.

"With Base22 and IBM, we finally got to a point where we had the right combination of expertise, design experience and research–based information, for a solution that we could plug and play."

— Chris Henkel, Vice President of Professional Development, Tinker Federal Credit Union

Base22 offers a portal blueprint that includes all the elements needed to provide a compelling user experience with minimal IT involvement. "The Base22 team trained us to effectively build on our IBM Digital Experience platform using its blueprint to upload content and display it the way we needed it displayed," says Jones.

The new employee portal went live just under one year from the project kick-off date and only six months after TFCU staff began inputting content. The bulk of that time was spent getting the content in the right state. "We didn't want to just transfer our content automatically over to web pages," said Jones. "We needed to go through each page to make sure the information was accurate and up-to-date before it was published." Altogether, the TFCU team created more than 1,200 resource and news pages using the Base 22 templates built on IBM Web Content Manager software.

"Throughout this project, Base22 has been responsive to our needs, mindful of our budget, professional and fun to work with." says Jones.

Fast answers

With the new portal, TFCU employees can quickly find the information they need to be successful. The portal organizes content by topic and role, enabling staff to access targeted information without having to know where it exists on the site.

In contrast, content on the previous employee intranet was organized by department and presented in nonsearchable format. "Because we had limited search capabilities, it was difficult for employees to locate information unless they knew which department authored and maintained that content," says Jones.

Now each policy or procedure has its own web page, which makes it easy for employees to search by keywords. And they can be confident that the search results yield the most up-to-date content.

One employee says, "Having all information regarding a single topic in one centralized location reduces my research time and helps me provide a hassle-free member experience." Jones adds: "Employees comment that the new portal has much more information than our previous site. However, the information they refer to is content that actually did exist on the old site. They didn't realize it was there because they couldn't find it."

Consistent, accurate content

To help ensure that portal content remains consistent, accurate and timely, TFCU encourages employee vigilance by taking advantage of the feedback button at the bottom of every web page, an important feature of the Base22 templates. When employees struggle with content on a page or have a comment, they click that button to automatically initiate an email to the content owner with a link to the page in question.

"I'm happy when they let me know something is wrong, even a spelling error, because it shows they care about the portal information and they now have an expectation that it's accurate in every way," says Jones. "And they have a fast, convenient way to alert somebody who can do something about it."

> *"We now focus on communicating information in the way employees want to receive it rather than on what's convenient for us in getting it out to them."*
>
> — Renee Jones, Assistant Manager of Professional Development, Tinker Federal Credit Union

Centralized source

Over the years, the lines have blurred between TFCU departments as customer service demands a more integrated approach. Consider debit cards, for example. Although TFCU has a Card Center focused on debit card products, branch employees must assist members with certain card services, including instant issue cards and PIN resets. The Card Center is responsible for authoring the policies governing debit cards. Branch Operations personnel author procedures for how branch employees assist members with this product, and Professional Development (training) staff authors the step-by-step work instructions used to perform card related functions. With the previous intranet, employees had to download and read three separate documents to learn everything they needed to know about debit cards.

Authored by three different business areas, these documents often conflicted. Employees would then have to call support departments to get clarification. "Our members lose confidence in our ability to serve them if the employees assisting them have to make frequent phone calls to get the information they need to do their jobs," says Jones. "And my professional development department received the bulk of such calls because when employees don't know how to do something, they figure we know because we provide the training. So we were spending more time taking phone calls and serving as a policy procedure help desk than we were spending in the classroom training new employees."

The new employee portal eliminates content overlap and duplication by centralizing all information about each topic on one web page, regardless of who authored particular content elements or who maintains these elements.

Efficient content management

Using the Base22 templates built with Web Content Manager software, authorized content owners at TFCU can easily create, revise and publish content without concern for where it is located on the portal. If the change requires approval, there are workflows in place to automatically alert appropriate reviewers. "That's all part of the blueprint that Base22 created," says Jones. "Previously updating content involved locating the original Microsoft Word documents, revising them with the Track Changes tool, and linking them to emails for review and approval before the new versions were converted to PDF format and uploaded to our intranet. Now, everyone works from the same source, cutting the change process time from weeks to days."

"Our new portal is empowering employees," continues Jones. "They are beginning to trust the new site as an accurate resource and a single source of truth, helping them feel more confident in their knowledge and decisions when serving our members."

Solution components

Software

IBM Digital Experience

- IBM® WebSphere® Portal V8
- IBM Web Content Manager

IBM Premier Business Partner

- Base22, LLC

base.22

Take the next step

To learn more about the IBM Digital Experience software suite, please contact your IBM marketing representative, or visit the following website:
ibm.com/digitalexperience

To learn more about Base22 portal solutions, visit the following website:
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