



# MARKETING



## GARDINER FCU DIGITAL BANKING CASE STUDY

**A true collaboration and partnership, from implementation through communicating with members.**



**5K+**

Members Reached



**6**

Communication Channels



**4**

Key Goals



**1**

Unified Team Effort

Nothing is so constant as change. But even when carefully planned and orchestrated, change is hard. It requires collaboration across many departments, implementation, and clear communication with staff and members alike. Add in an unplanned but necessary change and the stress levels can rise even further.

Gardiner FCU, headquartered in Gardiner, Maine, needed to update their Digital Banking system due to the sunset of their existing system. Not only was the product migration required, but they also needed to communicate this change to their members.

With an already established partnership in place with Synergent, they knew they could build on the foundation that was there. And with all needed resources in one place, they worked with the Synergent team to implement the new Access Softek Orpheus system and produce polished, effective member marketing materials to illustrate the digital banking migration. Working as an extension of their team, Synergent provided the credit union the resources they needed to complete a seamless technical transition.

“When faced with the impending sunset of our digital banking platform, panic initially set in,” said Stephanie Peppard, Member Service Supervisor at Gardiner FCU. “That quickly was replaced with peace of mind! I’ve worked with Synergent for a long time and know that there isn’t a more comprehensive, more experienced team in the industry. I didn’t have to juggle multiple vendors to complete the migration and to communicate it to members. It was a smooth, efficient experience working with Synergent. The migration was flawless, and members and staff alike were informed through eye-catching, effective communications!”

### The Process

Close collaboration occurred between Synergent and Gardiner FCU from start to finish. Behind the scenes at Synergent, cross-departmental collaboration was happening between Project Management, Implementations, and Marketing Services to ensure the right mix of expertise accomplished all deliverables on schedule.

Project goals included:

- Implementation of Access Softek’s Orpheus Digital Banking System
- Migration from prior digital banking platform
- Communication to members
- Recruitment of new members

*“The digital banking conversion implementation team and marketing team process was the best collaborative experience. The Team Lead was available, responsive, and completely understood the importance of providing members with accurate and timely information. Product conversion of any kind is why I love my job. There is no better feeling than to know you’ve helped alleviate the stress of a conversion is some way and allowed staff to focus on their own areas of expertise.”*

~ **Erica Vachon**  
Senior Marketing Support Representative  
Synergent

## Services Included:

- Comprehensive Implementation of Access Softek's Orpheus Digital Banking
- Migration From Prior Digital Banking Platform
- Staff Training
- Full Marketing Plan
- Communications & Content Creation
  - Member Email
  - Poster
  - FAQs
  - Digital Ads
  - Social Media Graphics
  - Interactive Digital Publication

## Project Management

The Project Management team at Synergent organizes all needed personnel and resources to ensure the project (in this case, a digital banking migration) has a plan and stays on track. They assist in answering a myriad of questions that inevitably come up during a digital banking conversion. This includes ensuring accurate configuration of digital banking features, conversion of member data, and continuity with the core processor and other existing, integrated programs at the credit union.

"Our experience is helpful to the credit union when making the many decisions they are faced with when changing digital banking vendors," explained Matt Arnold, PMP®, Project Manager for Synergent. "Our team benefits the credit union with our multiple years of experience. We work well to not only provide the credit union with answers quickly, but also anticipate some of their questions they may have and create best practices from what we've learned."

With Digital Banking being a key product for credit unions to offer their members, making a move from one vendor to another requires the evaluation of many business processes, which can be intense. Having clear goals and true support made all the difference for Gardiner FCU.

"We're proud of our experience and expertise with assisting credit unions in making the best decisions for their membership," stated Arnold.

## Implementations

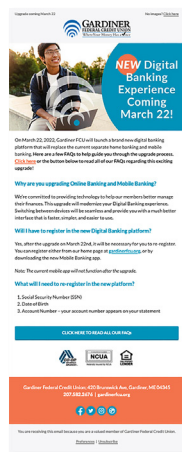
Synergent's Implementations team ensured that the migration of data from the old platform went smoothly, and that the new platform was efficiently implemented and that staff was educated on how to use it.

"Our experience comes not only from working on many, many of these projects, but also in having staff members on our team that have prior, real-world credit union experience," shared Alex White, Team Lead – Development-Analysis for Synergent. "They themselves have worked on online conversions and have the experience on both ends to anticipate and help with any questions."

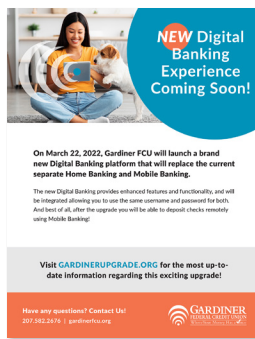
## Marketing Services

Gardiner FCU was already an established Marketing Services client. With this digital banking migration, the relationship grew even more.

"By working with operational staff focused on the conversion itself, we were able to alleviate some fear about how to tackle member communication by taking the lead," said Erica Vachon, Senior Marketing Support Representative for Synergent. "Gardiner did not have a marketing director on staff and the marketing piece was not initially a priority. With so much to do operationally on the implementation side, that was rightfully their initial focus. We took the lead to get the communications done by creating a timeline and content plan, developing communications, and executing on the plan. We removed their stress in this area and stayed on-time and on-budget."



EMAIL



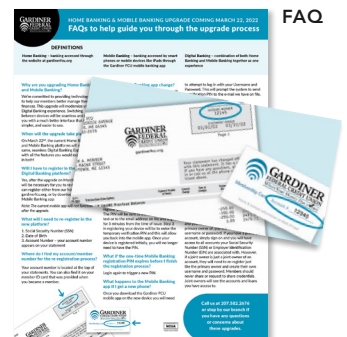
POSTER



INTERACTIVE DIGITAL PUBLICATION



SOCIAL MEDIA GRAPHICS



## For More Information

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