

# CREDIT UNION TIMES



## Symitar Groups Develop Independently

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By *Marc Rapport*

User groups are an integral part of doing business for IT professionals who work with major core processing systems, at the company and credit union level alike.

But it hasn't always been that way.

"My first one looked like an AA meeting. We met in a credit union's basement and sat in a circle, talking about what was going wrong with our host system," said James Burke-Frazier, senior technologist for Wescom Credit Union and its tech CUSO, Wescom Resources Group.

"The rate of change has been amazing," said Burke-Frazier, whose employer is a Symitar customer and provider of solutions to other Symitar clients, a potential customer base of more than 700 credit unions.

"Now we have multiple speakers and educational tracks," Burke-Frazier said, "and besides just vendors coming in and telling us what they can sell us, they're usually run for and by credit union people, so there's a lot of self-training, too."

That self-help attitude also has led to the development of a network of regional users groups whose members hold meetings and participate year-round from their desks.

"They're all independent. We don't financially support any of them but we do provide resources they ask for," said Ted Bilke, general manager of development and operations for Symitar's Episys platform.

"For instance, they might need some additional general ledger training or want us to come educate them on member business services and what we're doing," he said. "[Symitar President] Kathy [Hooker-Burress] and I try to go every one of the user groups, even if it's just a state-of-the-union kind of presentation."

But there's a lot more to do than just see and be seen at the regional users meetings, and just like at the conferences put on by the company itself, Symitar isn't the only vendor involved.

"Over the years, we've found that it's valuable to have common vendors that a lot of us may be using to participate, where at first it was just a channel for users to work with a single vendor, in this case, Symitar," said Ray Rounds, senior vice president of information services at the \$573 million Credit Union of Southern California in Whittier.

"And it works out well for everybody, because vendors get to know each other and we get to know them, and there's a bond that's generated just by knowing the person across the table," he said. "These meetings also are typically launch points for further communications down the road."

Those communications can often center on changing regulations and other market developments that require a response and solution from the technologists at affected credit unions.

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"A great example right now is the Card Act," said Rounds at Credit Union of Southern California. "There may be other credit unions further along in compliance on this than we are, or have made some kind of decision that they can share with us. It's good for the rest of us and for Symitar to both hear the rationale for what they're doing."

Working with third-party vendors also is a major area for the users groups and for the core processor itself, said Bilke, the Episys manager, and, with the growth of open systems that allow credit unions to do more on their own, it creates some new kinds of give and take.

He points to the three dozen or so Symitar credit unions that also use the Akcelerant collection package. One large credit union developed an enabling interface with Symitar's PowerOn connecting software and now can share that with other credit unions.

They can't sell it, though, and neither can Akcelerant, Bilke pointed out, but they can give that solution to fellow credit unions, something he said he has seen credit unions do frequently year-round. In fact, the company maintains about 900 PowerOn scripts, so there's plenty to talk about.

"A credit union can go out and post something on a forum or chat board and you'll have 10 or 15 replies in 10 or 15 minutes," Bilke said.

That willingness to share helps Burke-Frazier in a lot of ways. He's in a somewhat unique position as both a Symitar customer at Wescom and a vendor with WRG who goes to other credit unions in a consulting and development role.

"I haven't had an original idea in years," he said with a laugh. "I steal ideas from other people and other industries. There's a lot of potential out there. I can tell you that it's easy to see a lot of credit unions not using the Symitar platform to its maximum."

Burke-Frazier, of course, is in the business of helping credit unions do just that, although Bilke doesn't really seem him as competition.

"Our view is that we're a software company," Bilke said. "We do have our own professional services team, but we're very happy to see the WRGs of the world doing their hourly billable custom work."

And as for the company's attitudes toward the users groups, Burke-Frazier said, "I think the greatest thing Symitar has ever done is take its hands off the users groups and allow them to develop organically.

"It's just amazing to see how much these things have changed," he said. "Before, we'd gather around and listen to the vendors come tell us what's going on. Now, they come to find out what we're working on, too."

—*mrapport@cutimes.com*

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