



Los Angeles Firemen's Credit Union

Los Angeles Firemen's Credit Union turns to Adobe® solutions to enhance customer services and lower costs by automating forms creation and processing

Los Angeles Firemen's Credit Union

- A credit union serving more than 18,000 members
- Location: Pasadena, California
- Founded: 1935
- www.lafirecu.org

Industry

Financial Services

Solution

- Extended eBanking
- Forms Management

Products Used

- Adobe Form Client
- Adobe Form Designer
- Adobe Workflow Server

Company Profile

The Los Angeles Firemen's Credit Union (LAFUCU) has been serving the banking needs of its members for nearly seven decades. The credit union's 18,000 members can access services through multiple channels, including a branch office, ATMs, phone, and the Web. LAFUCU seeks to expand its member base while continuing to improve service quality and reduce costs. Adobe solutions for document process management are proving key to LAFUCU's ability to achieve these objectives.

Challenges Faced

Reduce operating costs and errors associated with customer transactions

To lower operating costs, LAFUCU wanted to automate numerous forms-based processes. Employees use more than 50 forms on a regular basis for internal needs such as expense reimbursement and supply requisitions, as well as customer requests such as revising account information, ordering checks, and requesting wire transfers.

Using preprinted forms resulted in slow customer service and higher operating costs. Multiple versions of each form proliferated, sometimes making it difficult for employees to know whether or not they were using the latest version of a form. In addition, employees were not always aware of all of the forms that were available, making it hard to complete business processes efficiently.

Automate business processes with limited technical support

As in most mid-sized credit unions, LAFUCU's information systems staff has numerous responsibilities, from providing Internet banking and electronic transfer solutions to maintaining core banking systems. Because of the expense of hiring a contingent of programmers, solutions for automating business processes are usually beyond the reach of a mid-sized credit union like LAFUCU. "We needed a cost-effective solution that we could deploy easily and customize, given the small size of our IT staff," explains Dan Riggs, IS supervisor for LAFUCU.

Expand to serve more customers

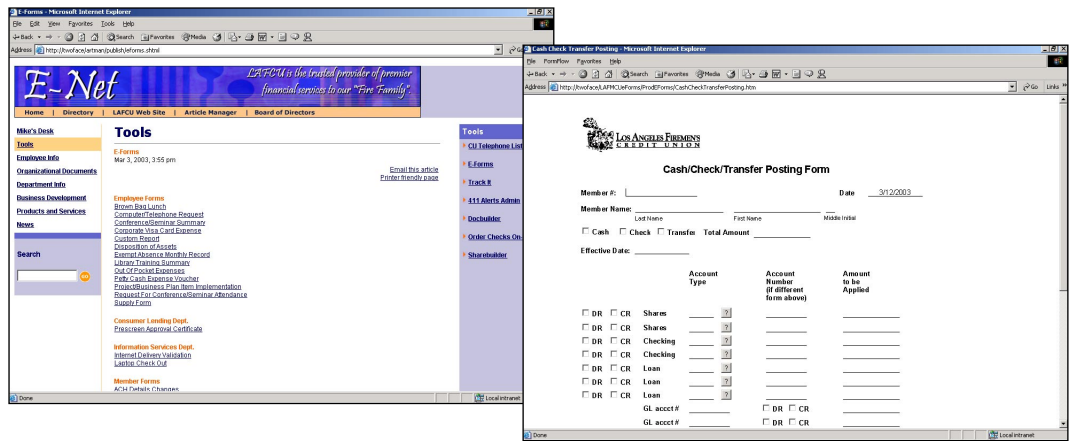
With just one branch office, LAFUCU is looking at more dynamic, forms-based online services to reach members who do not live near the branch location. In addition, one of LAFUCU's major initiatives is to offer services throughout California without building additional facilities or hiring more people. To support these goals, the credit union needs to invest in technologies that enable it to serve a broad customer base as efficiently and cost-effectively as possible.

Success Strategy

LAFUCU used Adobe solutions to automate numerous forms-based processes. The credit union staff relied on an easy-to-use Adobe electronic form design tool to create more than 50 forms in a matter of weeks, without hiring outside programmers. When employees click on an eForms link on the LAFUCU intranet, the Adobe solutions deliver the appropriate form. Staff can complete forms online and then obtain the appropriate staff or member signatures.



LAFCU automated numerous processes using Adobe solutions to design and deploy a centralized, online forms system. The Adobe solution populates and routes forms automatically, enabling the credit union to improve member services while lowering operating costs.



“We can customize the Adobe solution quickly to meet our own needs, without the expense of hiring a full department of programmers. We’re automating our processes like we never could before.”

Dan Riggs,
IS supervisor,
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LAFCU is further streamlining its forms-based processes with Adobe solutions that route forms automatically and prepopulates them with information from core business systems. The fully automated processes will allow LAFCU to specify business rules for each step, to ensure that forms are processed quickly, accurately, and efficiently. The credit union is also planning to integrate digital signatures into its electronic workflows.

Benefits

- Eliminated reliance on preprinted paper forms
- Achieved rapid deployment and customization of electronic forms solution with limited IT staff
- Enhanced customer services with faster, more reliable completion of transactions
- Lowered operating costs by eliminating the printing and routing of paper-based forms
- Improved accuracy of information on transaction forms by ensuring the use of proper forms and minimizing the need for employees to rekey information
- Provided a strong foundation for expanding business to new areas using Web-based services

The Adobe solution was easy to deploy. “We can customize the Adobe solution quickly to meet our own needs, without the expense of hiring a full department of programmers,” says Riggs. “We’re automating our processes like we never could before. The Adobe solution also provides an excellent foundation for expanding our business because we can quickly scale the solution to meet our future requirements.”

By giving employees centralized, online access to the latest forms, LAFCU is improving member services while lowering operating costs. Having up-to-date, accurate forms for all business processes enhances employee productivity. The credit union no longer has to preprint, copy, or distribute paper forms, further augmenting the cost savings.

“The solution has significantly improved our customer responsiveness and employee productivity by replacing our old, paper-intensive activities with streamlined electronic processes,” says Riggs. “We’re definitely increasing efficiencies, and the Adobe solution is a major contributor to that success.”

The Adobe solution also provides the foundation for LAFCU to offer services throughout California without incurring substantially higher operating costs. By enabling members to conduct service requests such as account changes or wire funds transfers online, the credit union can effectively serve customers statewide.

Concludes Riggs, “We’re very pleased with Adobe technology and services, and with the company’s commitment to meeting our needs.”

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