

Wright-Patt Credit Union Transforms Daily Operations and Crisis Management with Veoci



The Client

Wright-Patt Credit Union (WPCU) has been one of the leading credit unions in the U.S. since its founding in 1932. Since then, WPCU has been a trusted staple of the Ohio community. 31 locations are operated by the credit union throughout the Cincinnati, Columbus, and Greater Dayton areas. The institution also securely manages over three and a half billion dollars in assets for its constituents.

The Background

For a financial institution, maintaining operations through any scenario is paramount. Wright-Patt Credit Union, in tune with this principle, had developed continuity plans for various possible scenarios and crises. But, despite having these finely tuned plans, executing plans could prove to be far more difficult.

The plans were only on paper. In the event of a crisis, communication would be sent over standard avenues, such as email, and all vital team members needed to be in one physical location. Without a single, always-accessible space to manage these incidents, responses were extremely trying for everyone involved. Referencing paper plans and organizing the team slowed the response down dramatically.

The Challenges

Consolidation was the larger, overarching goal of this project. To achieve this goal, two primary objectives needed to be met:

1. Housing multiple facets of operations on one platform.
2. Establishing a common collaboration space as an electronic incident command center, as well as for daily operations.

In doing this, each team's silo would break down and collaboration would become seamless. Conversely, each team could operate independently of each other within this space when necessary. A new platform would need to create a new collaborative and operational ecosystem for the WPCU teams.



The Veoci Solution

WPCU's Facilities team overhauled their work order ticketing and tracking with Veoci. 3 different Veoci forms can trigger a work order workflow for the Facilities team: a public form available to all WPCU employees; a form available to Facilities team members; a form available only to the Facilities manager. After a form has been submitted, the Facilities manager can assign the work order workflow to one of the Facilities team members.

When resolving a ticket on-site, Facilities team members use the Veoci app to fill out the workflow with repair details. Without the need to fill out paper forms, WPCU Facilities team members can spend more time servicing repairs at WPCU locations.

Some emergency situations also launch work orders for the Facilities team. While this team's operations are normally separated from Risk Management's, Veoci allows them to effortlessly work together during these emergency scenarios; a plan that necessitates a total response from the



team easily pulls them together.

For example, in the event of a power outage at any one of the WPCU locations, one of their pre-planned responses are launched in Veoci. Any vital team members, whether they're Facilities or Risk Management, are immediately alerted to the developing situation with notifications from Veoci. Recovery tasks are also immediately assigned to the team so they know to start working towards stabilizing the situation.

When the plan is launched, all involved team members begin collaborating within Veoci. For this one incident, all of the team members begin to collaborate within a "room," the space in Veoci dedicated to the event. All communication is visible to the whole response team as well, creating a sense of situational awareness as the incident develops.



The most transformative part, however, is that this is all done virtually. Veoci is available through both the web and as a mobile app, making participation seamless. The locations of team members no longer complicate the response.

As an application, Veoci was also able to turn WPCU's paper plans into actionable processes. Every recovery action has become an assigned task. And, as these actions and tasks are finished, they're recorded. WPCU can track their entire response, during both real incidents and drills, and use that information to inform and improve their plans.

The Results

Trend analyses and in-depth risk assessments have never been easier for WPCU. With Veoci, WPCU can look back at responses and work orders to find any possible systemic issues. Full responses and recoveries can be reviewed within Veoci as well, allowing the team to strengthen their plans with post-incident analysis.

"We transformed a 45 minute process into a 10 minute process by putting information at our fingertips with Veoci"

**Matt Moreland, ABCP
Risk Manager
Wright-Patt Credit Union**

Strong post-event analysis wasn't the only result of this implementation, however. In total, WPCU saw the following results from implementing Veoci:

- A flexible platform capable of building operational solutions
- Efficient and streamlined processes, functions, and operations
- Full transparency during events and operations, from a team level to an executive level
- Remote and virtual participation from any location or device
- Large scale trend recognition, post-incident analysis, and plan development and improvement