

the power of partnership and automating business processes



First Financial of Maryland Federal Credit Union

Address

72 Loveton Circle,
Sparks Glencoe, MD

Phone

800-903-3328

Website

firstfinancial.org

Assets

Over \$1B

Members

66,000+

Founded

1953

A partner helps you grow in the good times and conserve in the tough times.

And that partner becomes someone you rely on to keep your core system optimized and processes efficient while creating a seamless member experience. But it's not just about keeping your system updated; it's about enhancing your core with new capabilities that help automate processes, build new efficiencies, and empower you to better serve your members.

"We have been with Jack Henry™ for over 30 years," reflected James Wheeler, Vice President and Chief Risk and Information Officer at First Financial of Maryland Federal Credit Union. "When we initially converted, the system didn't have all of the capabilities it does today and as a result we worked with Jack Henry to custom build functionality into the system."

Jack Henry's solutions are built to grow with your financial institution, providing the tools you need to meet evolving markets and business goals. First Financial took action to leverage the solutions that would help them thrive and best serve their members.

"Over the years, the technology has changed dramatically, and so has our business. We engaged with Jack Henry's Consulting Services to help us bring our system to current standards and make sure that we were following best practices," reflects James.

Our Consulting Services provide clients with expert knowledge, practical recommendations, and tactical implementation to meet the credit union's unique needs. The ultimate goal is to increase efficiency in operations, improve member service, and lower costs, whether you're a new or long-time client. Consulting was the first of several projects where Jack Henry partnered with First Financial to automate their processes. "Since our consulting engagement, we've completed a number of projects to bring our system to current standards, including: Electronic Receipts, Active Directory Integration, Account Close Workflow, Escrow Module, Synapsys®, Screen Pop API, AP ACH Origination, and the Collection Toolkit," notes James. "We now have more automated solutions for the staff to take advantage of and have decreased the amount of manual work necessary to perform simple tasks."



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James Wheeler

Vice President and Chief Risk and Information Officer, First Financial of Maryland Federal Credit Union



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First Financial also began using Data and Content Management services to help implement the automation process. These services leverage imaging and storage technology to provide enterprise-wide electronic knowledge management solutions and integrates easily into a credit union’s infrastructure, providing a secure central hub for all types of documents, files, and images.

“A consultant came in and took a deep dive into our system. They shared their recommendations on how to make the best use of the system, and we decided to create a new Cabinet, Type, and Index (CTI) structure, standardized indexes, created new profiles, restructured permissions, streamlined our AP Invoice filing, and implemented Bulk Refile,” James recalls.

The consultant’s recommendations have been a big help in creating more efficient workflows for employees. James says, “Since making these changes we have centralized our scanning and have been able to integrate with third-party vendors to file PDFs automatically. The new CTI structure allows for easier searching of documents by the staff.”

First Financial also implemented a solution to file trailing documents that came in directly through the system, which left less room for error and improved the staff’s use of time. James says, “It allowed us to reduce the workload and reduce confusion for our scanning team since trailing documents may not always be clearly identified. Before implementing this, we printed documents to a physical printer to send to another department to be scanned.”

Proactively automating processes meant First Financial optimized many of its processes before the pandemic hit and is now better able to compete in the new digital-focused reality.

And First Financial continues to explore new opportunities. James concludes, “Jack Henry continues to provide core enhancements and add on modules that help our staff better serve our members. With their commitment to continued development we’re able to leverage new capabilities and reinvent our processes for a better user experience. The staff is very knowledgeable and helpful, and they always make you feel like a valued client.”



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connect with next-generation technology

[Learn more](#) about our leading data and content management solutions.

For more information about Jack Henry, visit jackhenry.com.