

Executives Rise to the Occasion! How to Prevail During a Core System Conversion

By Peter A. Jeye

Stressful, demanding, nerve-wracking, and time consuming. A quick summary of a core conversion! Yet, avoiding the career hazards associated with conversions can be easy for credit union executives. In fact, it is an opportunity to be a true leader and even be a champion of change.



Here's the secret sauce:

1. Lead the Charge

Tradition is indeed comforting, but it's also a stubborn obstacle to having fun with the core initiative and moving the organization forward. Many talk about changing processes and work methods, but too often folks find it easier to just install the new system versus implementing its capabilities. By embracing the enhanced system features and communicating those enhancements to others, you can lead the way for others to follow and stimulate a mindset of change enterprise wide. Don't be afraid to move forward even if it means uprooting heavily entrenched staff responsibilities. Challenge other departments to join in – you may be pleasantly surprised by the response.

2. Collaborate

With change comes staff anxiety and a feeling of uncertainty. Take time to meet with your team and listen to their ideas on how to take advantage of the new system. They will feel valued! Collaboration always helps unite the troops.

“You can lead the way... and stimulate a mindset of change.”

Your new core vendor also has numerous considerations for you, based on wide-ranging experience. Depending on the services you purchased from the vendor, these ideas may be delivered to you via a formal process. The best advice is to decision every single recommendation, capitalizing on your investment for everyone's benefit. These change discussions will also help abate the impact of any silos in your credit union, providing added consensus.

3. Cultivate the New Partnership

We all know there is no perfect core vendor. Some days they shine and others, well, let's just say they aren't at their best. Wouldn't it be great if your new vendor teammates performed at their absolute best during your conversion project?

You worked for months selecting the right vendor, now's the time to embrace them in the battlefield and work through problems with a united, let's find a solution mindset. Producing results comes much easier when you bring a partnership perspective to the many conversion complexities you will undoubtedly face. The more successful the vendor is with your credit union, the more successful you and your credit union will be pre- and post-conversion. If the vendor does not respond to this positive approach, do not hesitate to call an executive to executive partnership health checkpoint.

4. Prioritize

Give the conversion project the priority it demands. The impact of “competing” initiatives can be a negative game changer causing risk, driving up stress, and triggering morale issues. Clear the deck of obstacles as much as possible. Be sure to take this strategy early on as most conversion projects that fall behind do so in the first few months of the process.

5. Be an Advocate

These initiatives involve hundreds of decisions, many will be minor but a good deal will have consequences related to member impact and the credit union’s reputation. You will be amazed how much you can contribute by simply representing the member’s perspective during the conversion project. Discussing decision options with a member-first attitude will bring consensus to what’s best for the credit union. Be sure to balance this with an understanding of each decision’s impact to staff to achieve easy buy-in.

6. Expand the “Box”

Your credit union’s subject matter experts are essential during a conversion, but your credit union will reach a higher level of success by inviting “rising stars” with new ideas and fresh perspectives. Whether it involves system testing, process improvement, reporting, training, etc., mix it up and reach into your organization to discover the aspiring bright minds – the payoff will be sweet.

When all is said and done, the result is dynamic **synergy** across all partners.

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A special thank you to **Kayla Mahnken**, Next Step Technical Writer, whose editing prowess made this article come to life.



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