

# Interface

A Newsletter from AFTECH



## AFTECH Adds St. Vincent's

AFTECH added another credit union to its Advantage ASP Client list (and its third Client in Connecticut) with the signing of St. Vincent's Medical Center FCU in Bridgeport. St. Vincent's, with 2,300 members and \$13 million in assets, will convert to the AFTECH system in February 2006.

St. Vincent's investment in AFTECH not only brings it the full range of AFTECH's Advantage member service products, it allows the credit union to add capability it does not now have.

In addition to St. Vincent's first foray into Internet services with [aftech@net](mailto:aftech@net), the credit union's members will see a wide range of electronic services, including e-statements; e-forms; and e-mail notification.

In welcoming St. Vincent's to the AFTECH family, AFTECH President Joe Antelloy commented that "The addition of St. Vincent's is a tribute by the credit union's management and board to AFTECH's ability to deliver its services effectively to a credit union of any size, and we appreciate that very much.

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## Client Meetings

Plans are falling into place for AFTECH's September Client events: Client Appreciation Day (Tuesday September 20) and the Department Managers' Meeting (Wednesday, September 21).

Clients will be invited to attend either or both of the meetings, and – aside from personal expenses, such as transportation and hotel – there is no charge for either event.

Client Appreciation Day starts with lunch at French Creek Golf Course, and continues with golf, followed by a reception and dinner at the Club. Non-golfers will follow a similar schedule (without the golf – other activities will be announced shortly!).

The Department Managers' Meeting the next day is a working meeting, with participants from different areas of AFTECH Client credit unions discussing a wide range of member service interests.

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Another Fiserv Connection



## ➤ From the President

With AFTECH's Advantage Relationship Management (ARM) solution you can get sales leads at the teller counter. Many of our Clients are searching for ideas to generate more loans and deposits and the answer may be at the teller counter and in the call center.

AFTECH ARM solution is designed to broadcast relationship enhancement suggestions to the servicing agent during the retail servicing session. The broadcasted message can contain marketing information uniquely suited to a specific member.

The ARM solution is categorized into three areas; campaign creation, campaign presentment and campaign monitoring. In the creation phase ARM provides the campaign manager with the ability to formulate a marketing plan and target individual members or groups of members for presentment. The plan can be self created or acquired from an external organization and imported into ARM.

Presentment, within ARM, is the actual broadcast or on screen display of the member specific

campaign information to the teller or servicing agent. At the point of display, the servicing agent is expected to voice the relationship recommendation to the member. Should the member show interest or accept the relationship recommendation the agent can easily open the service or transfer the member to another agent for service fulfillment.

Since Advantage logs or tracks all presentments, acceptances, referrals and rejections it is easy for the campaign manager to evaluate a specific campaign's effectiveness. At the same time agent performance is easily monitored at the enterprise, branch, work group or individual agent levels. As an added benefit, individual agents may inquire into their performance against predetermined goals.

If you are searching for an effective means to generate more business, ARM may be the solution. Please contact your Account Manager for more information or a consultation.

We appreciate your business,



Joe

## Riccardo Named Development Manager



AFTECH Professional Services Manager Joe Riccardo has assumed responsibility for leading AFTECH's Software Development Team following the departure of Joe Doyle, who held the position for more than six years. Riccardo has also been named AFTECH liaison with the AFTECH Technology Partnership Council (ATPC).

Riccardo has over 25 years of financial data processing industry experience. He joined AFTECH in 2001 as Professional Services Manager. In that

capacity he successfully organized and managed a team of professionals who collectively improved AFTECH's Client implementation experience.

Through this experience he gained a keen understanding of AFTECH Clients' performance expectations that will yield benefits in his new role. As ATPC liaison, he will have the responsibilities of coordinating AFTECH's activities and communications with our Client representatives.

Riccardo has been charged with the responsibility of expanding the Development Team over the next few months in order to improve AFTECH's ability to deliver more solutions faster.



## AFTECH to Move Michigan Operations

AFTECH is making plans to relocate its Northville facility to Fiserv's Troy Data Center within the next 90 days. This data center currently provides online processing and disaster recovery servicing for Fiserv Galaxy and OnCU (CUSA) Clients. AFTECH will join these Fiserv business units in sharing the facility for office space, training and education, disaster recovery and ASP Client processing.

AFTECH President Joe Antellocy explains "We believe this move will dramatically improve our ability to provide non-stop, secure servicing to our growing ASP Client base, while providing us with an excellent training and education resource in Michigan. In addition, the facility will house AFTECH'S existing staging and disaster recovery capacity. This move is another step in our efforts to improve AFTECH's ability to serve every Client effectively and efficiently."

All of the Northville staff members will continue working with AFTECH in their current positions.

### Client Meetings

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New this year is the Consultant's Corner, a chance for participants to meet in small groups or one-on-one with AFTECH subject matter experts on a number of topics.

Agenda topics include:

- Security Issues
- Advantage Loan Suite
- Secure Document Delivery
- New Member Application
- Marketing Enhancements
- Business Services
- Health Savings Accounts
- Network Security
- Personal Portal and Task Dispatcher



## Meet AFTECH:

### Sue Dexter

Sue Dexter, a nine-year veteran of AFTECH's Michigan office, serves as a solutions consultant with AFTECH's account management team. She came to AFTECH after a banking career that took her from teller to branch manager, and then a stint in business development with non-profit organizations.

The mother of 2 1/2 year old Emma (and shortly to become the mother of the so-far unnamed Baby Dexter), as well as caretaker of two rabbits and two cats, Sue is married to Dave Dexter, someone who should have been a long-

time friend.

As Sue tells it, "Dave and I met over Memorial Day weekend in 1994. He had stayed at a friend's cottage for nearly 15 years and I had been going up to my family's cottage (on the same lake and only two doors away) since I was a baby, yet we never met until then."

Originally from Maumee, Ohio, and a graduate of Ohio's Bowling Green University, Sue just moved from her home near AFTECH's Northville office to Vicksburg, Michigan (near her husband's new job with Mann-Hummel Automotive). She will continue in her AFTECH position, working from home. And when not working? Sue and her family will continue camping, boating, and fishing.

# AFTECH Offers Quicken Upgrade

AFTECH is enhancing the .net version of **aftech@net** to support Quicken's Web Connect interface to export transaction data to Quicken 2005 and later versions. **aftech@net** currently supports the QIF file format used in Quicken 2004 and earlier versions.

Addition of support for the OFX format as well as the QIF format for Quicken means AFTECH will support formats for:

- Quicken 2004 for Windows and older Microsoft Money programs;
- Quicken 2005 for Windows;
- Microsoft Money;
- QuickBooks;
- Quicken 2005 for Macintosh; and
- Comma-delimited files.

To implement the expanded support for Quicken 2005, credit unions will need to be on **aftech@net** Release 25.102 or higher. An OFX server is not required.



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"In addition, this transaction effectively expands the AFTECH marketplace to include hundreds of credit unions that are – for now – small in size, but that need a core processing system that allows them to compete successfully against far larger institutions. AFTECH offers that system."

St. Vincent's President/CEO

Mary Jean Ramsay said the credit union was faced with a major upgrade to its existing system to offer Internet banking which would require a substantial investment by the credit union.

"The Board of Directors felt that since they were committed to spending a significant amount of money, that we should

research other companies in addition to our current vendor. We looked at several, and there were many factors involved in the final choice. The leading factors were the quality of the product, pricing and previous knowledge of the AFTECH system, which finalized our decision," Ramsay said.



If you have any questions, concerns, or suggestions about AFTECH, or want more information, please contact:

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