

Helpful Hints from a Site Expert

by Jeff Wright



Jeff Wright explains how playing games helps develop mouse movement skills.

We asked Jeff Wright, a site expert who recently installed a network and trained staff at Railway Postal Clerks FCU in Philadelphia, to pass on some counsel to our clients who are looking for a site expert. Here's what he had to say:

What should credit unions look for in a site expert?

I feel that the most important aspect of choosing the best site expert is for them to be able to describe and communicate the complexities of a computer system in a simplified, easy to understand manner. With the huge amount of technical jargon this industry creates, the credit union needs to understand, "how is all this technology going to help my credit union grow and become more efficient?" I feel that, many times, experts in the computer industry take for granted that everyone has an understanding of how computer systems operate.

Another important point is to find one who can perform many or all the duties necessary to install a network of computers. Ideally, they can configure your new system, acquire the equipment needed, install the equipment and train the credit union to properly use this new equipment. If the site expert is involved

in all stages of the new installation your end result will be a more cohesive and smoother running network. It's easier to solve a problem if one company has completed 80% of the installation and it helps avoid the issue of who's responsible. The network is the heart of any good computer system; everything else will be relying on this system, including your data processing software.

As far as qualifications, there is no replacement for "experience", especially in this industry. Ask how many installations they have successfully completed and the number of years they have been in the industry. Also, ask for and call their references. Ask the potential site expert if they are trained as a Microsoft Certified Professional (MCP). The most preferred is a MCSE (Microsoft Certified Systems Engineer) or a similar Microsoft certification, which would mean that they are familiar with the common standards of building a reliable computer system.

How can the credit union be sure that they have made the right choice for a site expert?

Two important factors here are, organization and communication. All networks require good project manage-

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ment. They must be able to "outline" the flow of events and be able to do this in such a way that you understand what steps are involved. Get a flow chart of events leading up to the network going live, so that there are no obstacles (or just minor ones) to overcome. Identify which parties are responsible for each part of the new system. This includes the credit union, site expert, data processing company and any third party software vendors that might have specific requirements of the network. Also, communicate with other credit unions that have gone through this process. They can refer you to a knowledgeable expert that they have used.

How can the credit union prepare for the site expert's arrival?

The credit union can help in collecting as much information about how their network should be configured. Know what software you have, version numbers, release numbers and find as much documentation about the needed configuration of the software that might be installed on the network. Doing this will lower the cost of the site expert and get the credit union more involved from the beginning. Be sure that older soft-

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ware will be able to run on the new network platform you plan to use, like Windows 2000 Server.

What challenges will the credit union face as they implement the new network?

If you are going from a DOS based system to a Windows based system, be sure that your credit union staff are trained on the basic use of Windows. Time management is critical as well. Plan to install the network in stages, so that you have time to absorb new skills and become comfortable working with new equipment. You don't want to put a completely new system in place in a month and expect everyone to work as smoothly as they did with the old system. Your staff is familiar with doing their jobs, "the way it's always been done", so phase in the new system components over several months, if possible. This will eliminate or minimize issues with doing things the "new way" and make the process more enjoyable.

What are the benefits of a new network installation?

Flexibility is a substantial benefit to today's networks. Because of the sharing of resources on the network, the credit union will be able to be more efficient. For example, from any workstation (PC), any staff member could create a document, start a program to pull a credit

report, fax a document, and pull a needed file from the hard drive of another PC. They can easily do this with a network. The old way to do all this was to go to a PC that had a word processing program, create a document, print it out, go to the fax machine and fax the document; then go to the PC that can pull a credit report and print the report. Next, you'd have to figure out which PC contained the file that you need, copy it to a floppy disk, go back to your PC and copy it to your hard drive.

A network will greatly reduce the time needed to do simple, everyday tasks, which will increase the time available to serve members' needs, not your computer system's.

There is a vast variety of software available today that could be installed on your network. It's less expensive to buy a "network version" of the software, which all workstations can share, than to purchase one copy of the software for each PC.

What can CU's do to partner with their new site expert?

As with any solid business relationship, realize that we are all in this together. Successful partnership requires all parties involved to be able to gain mutual confidence. If there is an issue that has not been addressed by one party, all will have to pay the consequences of a poorly planned and implemented system. The

key is to keep all lines of communication open, share your thoughts and prepare for a successful installation!

Also, educate yourself on some of the basic knowledge of how the network functions. There are many good books that can break down the network's technical aspects into small, understandable blocks. At the same time, leave the network installation to the experts and steer away from allowing "volunteers" to help with the installation; this can lead to more problems and expense. 📖

While CCCorp does not endorse any particular vendor at this time, Railway Postal Clerks' experience was very positive. If you wish to contract with Jeff Wright for counsel, training or installation services, he can be reached at:

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You may wish to follow Jeff's advice and call John King, COO of the Railway Postal Clerks Credit Union, to ask about his experience. He can be reached at 215-386-8126.