

# FMSI Case Study Library

## **“A Tool That We Cannot Do Without”**

### **A Story about a Florida Credit Union’s Staffing Productivity**



PriorityONE Credit Union is a Florida based full service financial institution with its origins tied to the United States Post Office (USPS). Much like USPS’s new advertising slogan, “A Simpler Way to Ship,” POCU realized a “simpler way to improve productivity” when they partnered with Financial Management Solution, Inc. (FMSI) and started utilizing their Teller Management System™ (TMS). Over time, after realizing substantial productivity improvements, the President/CEO of PriorityONE Nancy Rappaport, summed up her FMSI experience by stating, “We have determined that FMSI’s Teller Management System is a tool that we cannot do without.”

“We are utilizing an industry tool that tells us how to best staff and schedule our branches. It is great.”

- Nancy Rappaport,  
President/CEO of PriorityONE

#### Getting Started

Initially, POCU visited one of FMSI’s clients to learn more about the TMS solution and was very impressed by the demonstration and referral. POCU subsequently agreed to participate in a no-cost trial period with FMSI, which allowed them to see first-hand how their staffing performance data stacked up. The first step of the process was to provide FMSI 90 days worth of data for a full analysis. Once the trial report was complete it highlighted some critical areas for improvement. Subsequently, the POCU senior management team was eager to move forward.

Following hands-on training from FMSI to all of their branches, POCU started implementing some of the targeted actions based on goals they established with the help of FMSI’s dedicated Client Services team. For example, they aimed to improve their initial branch network Transactions Per Hour (TPH) ranking, which was compared to all other FMSI clients.

#### Improving Productivity

It did not take long for POCU to climb up in the FMSI standings with a dramatic improvement from the 67th percentile to the 35th percentile. The President/CEO of PriorityONE, Nancy Rappaport, explained

this impressive jump, “We previously had no way of comparing our performance. FMSI publishing (among their clients) their monthly client performance rankings is extremely helpful towards setting and achieving our goals.”

Now armed with pinpoint decision-support data, POCU was able to make difficult decisions with confidence. For example, they changed operating hours for all three branches and also increased their use of part-time personnel. Nancy expressed her confidence in the TMS supporting data, “We are utilizing an industry tool that tells us how to best staff and schedule our branches. It is great.”

POCU also recently implemented the FMSI incentive plan that rewards top performing tellers. They were able to enact a program that best suited their needs with the help of FMSI’s Client Services team. This program has greatly raised employee morale and their productivity.

#### Tips from the CEO of PriorityONE Credit Union

- Recently I had a member call me to complain about wait times. The specific data from our TMS report helped me fully understand the particular situation the member was in, which helped me rectify the situation.
  - Challenge your branch managers to improve specific numbers from the TMS reports. In my experience they appreciate having the performance data to have something to target.
  - Set realistic goals from the TMS reports and then follow up and review them periodically.
- Much like the new United States Postal Service’s advertising slogan, “A Simpler Way to Ship,” the Teller Management System™ has led to a “simpler way to improve productivity” for PriorityONE Credit Union. Adjusting operating hours, increasing part-time utilization practices and implementing an incentive program have all led to a significant gain in productivity and overall performance.

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#### About PriorityONE CU

PriorityONE Credit Union is a full service financial institution, providing you with many savings plans all federally insured up to \$250,000, great checking, loans for almost any purpose, and easy access to your accounts by phone, online and at ATMs nationwide. You can call them at (954) 335-5100 or see their website at [www.priorityonefl.org](http://www.priorityonefl.org)

## About Financial Management Solutions, Inc. (FMSI)

Located in Atlanta, GA and established in 1990 FMSI provides easy-to-use, yet sophisticated, systems – The Teller Management System™ (TMS) and The Lobby Tracking System™ (LTS) – that allows you to manage and staff to meet service and sales needs like never before. We offer you the ability to schedule your team throughout your branch network, and to manage them through easy to read color graphics and succinct management reports.

FMSI helps enhance performance management information exclusively with financial institutions of all sizes throughout the United States. Visit the company's web site at [www.fmsi.com](http://www.fmsi.com) or call 877.887.3022 to schedule a complimentary online demonstration of The Lobby Tracking System™.

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Please visit [www.fmsi.com](http://www.fmsi.com) and subscribe to our monthly newsletter, which is filled with in-depth case studies and tips on enhancing branch staff performance.