customer stories

Giving Employees the Right Tools for the Job

DFCU Financial upgrades to Snagit after free tools become a hindrance to business

Founded in 1950, DFCU Financial began with a group of Ford engineering employees. Today, DFCU Financial is the largest credit union in Michigan and one of the best managed financial institutions across the United States. With 24 branches across Michigan, teams at DFCU Financial needed a way to establish and standardize procedures across departments and branches. So, they began to document these procedures with Snagit.

The Problem

As with any financial institution, efficiency and documentation are essential. So, when DFCU Financial decided to overhaul their documentation processes to better accommodate their growing departments, they naturally turned to screen capturing software.

"Part of our IT strategy is to first try to use the tools included in our operating system," said Vanessa Dinn, IT project manager at DFCU Financial. "When we upgraded to a newer version of Windows, we started using the screencapture tool built into our operating system, which allowed us to capture a screen. But that was basically all it did."

"We tried annotating screen captures with the free operating system tool," said Vanessa. "But the results always looked choppy and unprofessional. We needed a tool that was quick but provided a clean look."

While Vanessa was struggling to create high-quality images for the DFCU Financial IT knowledgebase, tellers at branches across the state were also struggling with the limitations of the built-in tools.

At the end of the day, tellers are required to capture closing totals and record any discrepancies. Their core banking system did not offer an easy way to do so. Using the built in tools took multiple steps and made the process much more complicated than it needed to be.

After assessing the limitations of the screencapture tools on hand, Vanessa set out to find a tool that would meet the needs of employees across the company without breaking the bank.

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At A Glance

- DFCU Financial employees needed to capture their screens as part of a company-wide push for process documentation.

- Employees found free operating system tools cumbersome and lacking required features, so DFCU FInancial purchased TechSmith Snagit.

- Snagit now helps employees process information faster and with a professional polish that meets the high-quality expectations maintained by DFCU Financial.

Featured Product

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The Solution

In her search, Vanessa came across Snagit by TechSmith. With Snagit, she was able to quickly capture, annotate and share her screen with a clean, professional look.

"Features like the all-in-one capture, the blur tool and the Snagit library make it much faster and easier for us to share information around the company," said Vanessa. "I use Snagit on a daily basis. It's like a bookmark for my work."

For tellers, Snagit makes capturing end-of-day totals from their workstations far more simple. All tellers have to do is capture the screen with Snagit and print.

"With the free tool, we had to save the image to the desktop and print it with the Windows Image Viewer, which added a number of unnecessary steps," said Vanessa.

Other departments also struggled with emailing screen captures. With Snagit, all they have to do is capture the screen and paste the information directly into an email for documentation purposes—without having to worry about attachments. According to Vanessa, "Snagit sits right within the company's Lotus Notes client environment, so when we include images in our email, it goes directly within the email."

The Results

Vanessa is now able to create clear, concise manuals for the company's IT knowledgebase. Rather than drawing annotations by hand, Vanessa is able to use the Snagit editor to quickly modify any screen capture while maintaining the professional look she expects her work to have.

With Snagit, the documentation process for tellers is much more streamlined and stress free. The simplified process has also decreased the number of helpdesk support calls from tellers.

DFCU Financial has ranked in the top 10 financial services organizations for financial performance among peer credit unions across the nation for more than 10 consecutive years. They continue to push for documentation across the organization to maintain their excellent standings. Beyond Vanessa's department, employees in accounting, finance, marketing and more are also capturing their knowledge to share with others.

"In addition to everyday processes, we also have to document processes to answer the tough questions," said Vanessa. "How do we document the knowledge of our most experienced staff if they retire? What do we do if there's a disaster? Snagit allows us to document answers to those questions."

DFCU Financial is now able to document processes and knowledge in a clean, easy and professional way. With the help of Snagit, Vanessa and her colleagues are able to document and maintain the excellence for which DFCU Financial is known.