



USER SPOTLIGHT

Kelly Scott

Vice President of Information Technology

ABOUT



HEADQUARTERS

Brandon, Manitoba, Canada


ASSET SIZE

\$1.7 Billion CAN

(as of August 2021)

NCINO SOLUTIONS & FEATURES

 Deposit Account Opening
(on-line & in-branch)

 Commercial

GET TO KNOW

Kelly Scott is the Vice President of Information Technology at Sunrise Credit Union. Kelly has served on the Executive Team at Sunrise since joining the Credit Union in January 2019. In his position, Kelly has helped Sunrise undergo a digital transformation leveraging nCino's Bank Operating System®.

Sunrise Credit Union is a financial institution headquartered in Brandon, Manitoba, Canada. Established in 2008 through a strategic merger of five legacy credit unions, Sunrise has now grown to serve the Parkland and Western Manitoba regions with over 20 branches. Sunrise offers personal, agriculture and business accounts to best serve its wide variety of members.

As the Vice President of Information Technology, Kelly is a key player in the digital transformation efforts at Sunrise. Prior to the COVID-19 pandemic, the team at Sunrise partnered with nCino to initiate a digital transformation that would replace disparate and disjointed systems and enable the Credit Union to improve both the member and employee experience. With the nCino Bank Operating System®, the Credit Union can digitize and streamline back- and mid-office processes and create a streamlined and efficient workflow through a single cloud-based platform.

Sunrise initiated their digital transformation by first leveraging the nCino Deposit Account Opening (DAO) feature to streamline the account opening process. The Credit Union now offers a user-friendly, in-branch and online experience tailored to its members. Sunrise is currently expanding their use of the nCino platform as part of their overall digital transformation strategy.

"Since implementing the nCino Bank Operating System®, we have seen a tremendous improvement in member and employee satisfaction. The automation that nCino provides has increased the efficiency and flexibility of our services, ultimately strengthening our relationship with members. We are looking forward to a long-term partnership with nCino on our digital transformation journey."

- Kelly Scott

Vice President of Information Technology



WE ASKED, THEY ANSWERED

How did you identify a need for digital transformation at Sunrise?

Over the last 12 years, we have grown via mergers and that left us with a lot of legacy platforms and assets that needed to be brought together. We also found we had multiple ways of doing things in different branches. It was a real challenge to modernize.

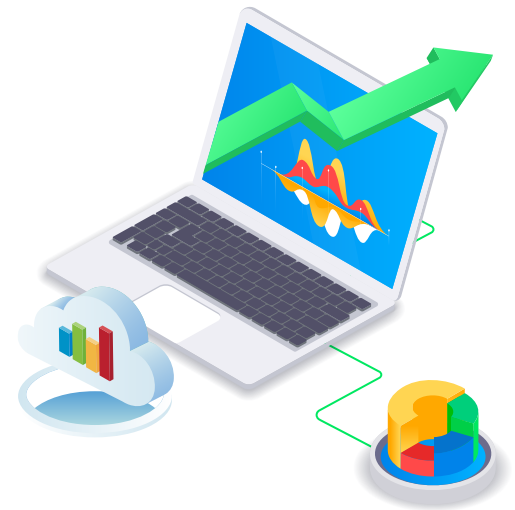
To serve our membership best, meet their needs and streamline our processes, coming up with multiple ways to solve these problems and marry them together was not ideal. We found that nCino was one platform that could do all those things for us, equally well.

How has nCino enabled Sunrise to streamline its processes to better serve members?

Before nCino, we were using cumbersome legacy systems, none of which communicated with each other - this created many inefficiencies in our processes. With the nCino Bank Operating System, we streamlined our processes and have new transparency across the Credit Union and a 360-degree view of our members. Our employees are now able to spend quality time building relationships with members, and better serving their needs. The pandemic has also drastically changed member expectations. We've seen a rapid uptick in members choosing digital pathways and moving away from face-to-face interactions. Our goal has always been to serve our members the best we can. With nCino, we can serve our members whenever they need us, whether it's virtually or in person.

What was the importance of starting this large scale transformation with a smaller DAO project?

We had conversations on how to approach this large-scale change. We started the digital transformation journey by addressing DAO, a very competitive field within our industry. We started here because DAO, the member acquisition journey and member onboarding were all important to us. We could also collect data in one instance and build on that information. Once we got that right - we quickly followed with the Commercial Lending Solution. Finding a technology partner that could address not only account opening, but also our agriculture and retail members has been a huge benefit to Sunrise.



How has implementing nCino affected Sunrise employees?

Our employees recognize the value of our members - they are passionate about meeting their needs and our previous systems didn't serve that purpose. Before nCino, the process of onboarding a new member and creating a new account or loan was inflexible and time-consuming. Now, with nCino, instead of checking boxes, we designed an onboarding process that benefitted both staff and members. The processes enable our employees to establish relationships and better focus on the member.

How will Sunrise continue this momentum of continuous innovation?

Currently, we are on track to finish our Commercial Lending Solution implementation this fall, with a Retail Lending piece happening shortly after. This is just the start of our journey. Digital transformation is tied to our long-term goals to grow and scale. We have to get digital transformation right before we do anything else. We are confident in our partnership with nCino and hope to continue innovating together to make Sunrise the best it can be.