

Interra Credit Union

A Credit Union's Success Results in a Vow to Never Return to Paper

? THE CHALLENGE

Interra Credit Union relied on paper, preparing their board book around a very large table, hoping last minute changes wouldn't arrive. Yet, often those changes were unavoidable. Printing, assembling, copying, shipping and distributing their 200-page board books proved a demanding process.

Amy Sink, Interra Credit Union's CEO, remarked "In a paper world, when you are standing around a copier, pages get missed or get put out of order." Once in a meeting, directors needed a better way to stay organized. A way to avoid floating through dozens of pages, a way to keep everyone on track. Interra began a search for a board portal solution, to solve distributional challenges and keep their meetings focused.



THE RESULTS

OnBoard solved Interra's creation, distribution, and meeting challenges. They expanded OnBoard's use to include executive committee meetings, and saved \$8,000 a year in printing, shipping, and bindings costs. The results were conclusive "I can't imagine ever going back to using paper, and how much time it took to do that," said Interra's CEO Amy Sink.

THE SOLUTION

Interra Credit Union implemented Passageways OnBoard to resolve the challenges of creating paper board books and assist their directors in organizing meetings. OnBoard made the creation and distribution of their board books as simple as a few clicks of the mouse. Previous meetings were used as a template to quickly build out new agendas, and board books were seamlessly uploaded to their directors. The solution allowed for immediate updates, ensuring all the board members had the latest version of all their documents.

The simplicity of the process drove results in the boardroom. Interra's board consisted of members from various backgrounds, from farmers to financial veterans, and when they picked up OnBoard they all intuitively understood how to use it. Their meetings became more organized and focused through OnBoard's powerful search and annotation features. They stayed on the same page through presenter mode, as one individual helped guide the meeting.

And when questions concerning previous meetings arose, they were able to quickly look back at documents without needing to dig through a pile of paper to find a single item. Amy Sink summed up the experience in the board room, In a meetings I can get access to all my internal documents and board documents. When you have paper you have to have those documents with you all the time. OnBoard made it extremely easy."



Our Customers

We are committed to every credit union customers, staff, financial managers, and leadership who continue to inspire us to create a more collaborative world



"All documents are in one spot and no one has to remember who emailed what or where any document has been placed. They can quickly reference the one location easily... I can't imagine ever going back to using paper, and how much time it took to do that."

- Amy Sink
CEO, Interra Credit Union



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