

# CREDIT UNION JOURNAL

## How One CU Visualizes Success

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SPOKANE, Wash. — Spokane Teachers CU rarely goes back to the drawing board when it builds new business applications — the CU's web business forms are now brought to life in visualization software, shoring up upfront investments and easing frustration for staff.

"We've replaced the manual process of using a whiteboard to draw what we think business users will expect in a new Web form," explained Danny Jones, software development manager at the \$1.25-billion CU here.

Now, the Spokane Teachers (STCU) business analyst mocks-up new web forms in visualization software provided in October by El Segundo, Calif.-based iRise.

STCU can visualize a new web form with just four hours on iRise and two team meetings, said Jones. "User acceptance is usually a slam-dunk, and we're off to code the form, test it and go 'live.' Users have a better understanding of the end-product they'll be getting, and developers know what is expected. We've gained in efficiency and in the amount of time we spend on the development cycle."

"The business analyst learned how to use iRise right away" — and she's not a technical expert, said Jones. iRise provides a library of widgets, such as buttons, drop-down menus, and form fields — as well as screenshots from existing STCU Web forms — that the analyst can drag and drop to create a new form. Navigation and decision trees for the form can be created with similar functionality.

When the analyst completes a mock-up, she can email it to business users to play with, or the team can access it from a centralized server.

"The business users are delighted with the iRise visualization" said Jones. "It has the look and feel of the real thing, including the workflow. Sometimes users get confused and think the iRise file is the actual Web form because it's so realistic."

"iRise gives financial institutions a way to visualize the end-state of projects quickly and cheaply," said Mitch Bishop, iRise CMO. "Our customers tell us that visualizing is enabling them to deliver twice as fast, with at least 30% less cost on all kinds of projects."

STCU does everything through web forms, Jones added. The forms act as documentation and workflow for many business processes at the CU. The Web forms include notification of member travel (for anti-fraud purposes); transaction research; wire transfers; VISA forms; or requests for time-off or business cards.

The biggest problem with envisioning a new Web form on a whiteboard was the rework it entailed, said Jones. "The whiteboard didn't give business users a finished look." Users had to "figure out in their minds" what the drop-down menus would contain, for example. They needed to see how the results of one choice on a menu would affect the remainder of the form fields.

The web form team use to meet at least four times to hammer out user expectations, continued Jones. After each meeting, they took pictures of the whiteboard for reference. Even after the meetings and whiteboard mock-ups, software developers ended up programming Web forms that weren't exactly what users expected - and the team went back to the drawing board. "There was a lot of back and forth," he said.