

# arkatechture

## CASE STUDY | DSA with TEG Federal Credit Union

### CLIENT PROFILE

Based in Poughkeepsie, New York, TEG Federal Credit Union was started by a group of teachers in 1969. Today they serve nearly 40,000 members.

### THE PROBLEM

TEG Federal Credit Union understood the importance of harnessing data, but faced the daunting task of where to begin with so many moving parts. They wanted a clear roadmap, but needed guidance to prioritize their initiatives effectively to become data-driven in a way that delivers value back to their members.

### THE SOLUTION

TEGFCU collaborated with Arkatechture, who provided valuable guidance and recommendations tailored to their needs. Arkatechture proposed initiating the project with a Data Strategy Assessment (DSA), which is a comprehensive process designed to evaluate TEGFCU's current readiness and identify opportunities (and roadblocks) for success.

### TOOLS

- Arkalytics
- Data Strategy Assessment (DSA)

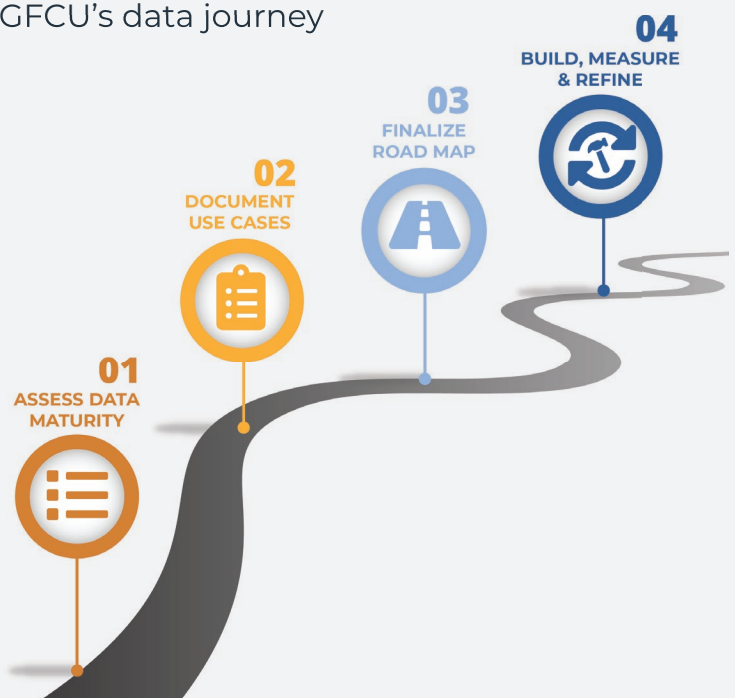


### MISSION

At TEG Federal Credit Union, the best interests of their members have always been their focus. They've stayed true to their original commitment of offering their members a better alternative to banks, and they proudly serve their growing field of membership with practical advice, realistic solutions, and a smile.

### PROJECT RESULTS

A game plan with detailed steps for TEGFCU's data journey



## INTRODUCTION

TEG Federal Credit Union embarked on a transformative journey to leverage data effectively within their organization. Recognizing the complexity of this endeavor, they sought the expertise of Arkatechure, a leading provider of data strategy and analytics solutions for credit unions. This case study will examine TEGFCU's experience undergoing Arkatechure's Data Strategy Assessment (DSA) process and the pivotal role it played in shaping their data strategy roadmap for years to come.

## THE CHALLENGE

TEG Federal Credit Union understood the importance of harnessing data, but faced the daunting task of where to begin with so many moving parts. They wanted a clear roadmap, but needed guidance to prioritize their initiatives effectively to become data-driven in a way that delivers value back to their members. They recognized that in order to implement a huge project like a data lakehouse, they would need to carefully plan their next steps to achieve adoption and a return on their investment. A successful data analytics program would need to include not just the technology, but also the people and processes surrounding it.

**"We're very ready to work with the team. Lot of open communication. Every step of the way, from sales process, to the DSA, to talking to Jamie, you guys are really sealing the deal on practicing what you preach. It's refreshing to see."**

- Cory Shapiro, Chief Operating Officer  
at TEGFCU

## THE SOLUTION

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Through the DSA process, TEGFCU was pleasantly surprised to discover the readiness and enthusiasm of their team towards implementing a data analytics solution that would help them save time through automation and unlock new insights into their business and membership base. The organization was well-prepared, well aligned and excited across departments for the new opportunity and capabilities this would afford them.

## STREAMLINING OPERATIONS & ENHANCING EFFICIENCY

One significant outcome of the DSA was the identification of redundant reports and processes within TEGFCU's operations. Arkatechure's insights allowed TEGFCU to streamline their reporting mechanisms, eliminating duplication, saving valuable time, and improving overall efficiency.

Once Arkalytics is implemented, TEGFCU will prioritize report automation as their initial focus, recognizing it as a crucial step towards showcasing the return on investment (ROI) of their data initiatives to senior management. This strategic approach aimed to garner support and buy-in from key stakeholders.

Following a framework described by Nucleus Research, the first step of capturing ROI for a data analytics project is through automating reports. The following stages include building dashboards for decision makers, extending analytics access throughout the organization, and ultimately, using historical data to model predictive analytics.

## **ROADMAP TO SUCCESS:**

The DSA served as a catalyst for the TEGFCU team to plan out their data journey for the first 12-18 months, providing a clear and actionable roadmap. This roadmap describes the steps needed to successfully implement and adopt a modern data analytics platform, such as Arkalytics in this example. The DSA significantly boosted TEGFCU's confidence in their ability to leverage the Arkalytics solution effectively post-implementation. Additionally, it will empower them with the necessary insights and capabilities to segment and better understand their members—a previously challenging task.

**“I can’t imagine launching something like this without doing a DSA- because if you didn’t do it, it would be like drinking out of a fire hose, right? So, I think that you have to do it - you have to.”**

- Cory Shapiro, Chief Operating Officer at TEGFCU

## **CONCLUSION**

TEG Federal Credit Union’s experience with Arkatechture’s Data Strategy Assessment exemplifies the importance of a structured and collaborative approach to data transformation and yet it is only the beginning of their data journey. By leveraging Arkatechture’s expertise, TEGFCU gained clarity, alignment, and an actionable plan to navigate their next steps successfully. The DSA not only identified opportunities for efficiency gains, but also empowered TEGFCU to harness the full potential of their data, drive strategic decision-making, and deliver enhanced value to their members.

Through this partnership, TEG Federal Credit Union demonstrates the transformative power of embracing data-driven strategies and the pivotal role of strategic assessments in laying the foundation for success in the digital age.