

Credit Union Improves Efficiencies With User-Acceptance Testing Automation



Meeting member expectations, staying current and delivering new capabilities as quickly as possible drove Rally™ Credit Union to search internally for ways to improve productivity, efficiency and identify savings. It found exactly that with automated user-acceptance testing for software updates.



Partnering with Fiserv has allowed us to focus on our members and continue our vision of being the community's first choice for financial needs."

Clare Fowler

Senior Vice President,
Operations Technology
Rally Credit Union

Client Profile



Rally Credit Union was chartered January 28, 1955, as Naval Employees Corpus Christi Federal Credit Union. Over the years, through careful management, outstanding member service and supportive membership, Rally CU has grown to become the largest credit union in South Texas, with 187,875 members and more than \$3.5 billion in assets.

The credit union has 19 branches and a full-service real estate center. Rally CU, which has 600 employees, embraces the philosophy of "people helping people" and values social responsibility.

→ Challenge

The manual, labor-intensive approach Rally Credit Union used for testing DNA core updates to the DNA® account processing platform from Fiserv prevented the credit union from getting new capabilities to market as quickly as it wanted. The process also took time away from the credit union's priority of responding to members' needs.

→ Solution

Rally CU leveraged automated user-acceptance testing (UAT) and collaborated with the UAT team at Fiserv for training, establishing manual and automated test scripts and creating a comprehensive dashboard to aid the senior team in "go-live" decision making.

→ Proof Points

- Rally CU used to spend more than 360 hours testing a software release and now spends less than 25 hours, freeing more than eight weeks for the credit union to allocate to other projects
- There is now a shorter turnaround time across multiple teams for deploying new capabilities
- The credit union's testing went from manual and task intensive to efficient and seamless. Rally CU receives weekly dashboards during upgrades with excellent documentation, and has grown more confident in deploying new software

Testing core updates had regularly challenged Rally CU, because the credit union couldn't get to market as quickly as it wanted. With Rally CU's manual approach it was sometimes a struggle to find time to review DNA, release notes and compile necessary testing cases. Using that approach, the credit union also had to schedule time for branch staff and functional users to be away from daily duties and for business users to get training on the updates.

Rally CU turned to the UAT team at Fiserv to find more efficiency in the process. Clare Fowler, senior vice president of Operations Technology for the credit union, said that the UAT collaboration made a big difference.

"As with any release, staying on top of compliance updates, functionality improvements and new features remains critical for any financial institution," she said. "The Fiserv UAT team helped our credit union meet those goals with its structure, communication and teamwork."

Setting Goals for Greater Efficiency

Whenever core updates are released, the financial institution has to make sure they work as expected. Rally CU's manual, labor-intensive approach to testing updates took about 360 hours for every release.

The credit union manually maintained testing spreadsheets, test cases and DNA team documentation necessary for opening support tickets. In addition, the credit union testing team was not able to quickly provide results and recommendations to Rally CU's senior management team.

In automating user-acceptance testing, the credit union set goals to free up staff time, so associates could better respond to member needs. Rally CU also wanted testing consistency to meet audit and examiner expectations.

A Successful Switch to

Automated Testing

Fiserv helped Rally CU achieve those goals by collaborating with the credit union's business and technical teams, and providing automated and manual test scripts as well as test execution services, including comprehensive dashboards and reports. The credit union's IT team, business users and senior management use the dashboard for "go-live" decision making.

The automated testing includes 800 DNA test-automation scripts and 50 Rally CU scripts to test DNA customization with the credit union's third-party tool, MeridianLink®. For custom scripts, Fiserv developed manual and automation scripts.

Fiserv also conducted user training for Rally CU on standard DNA and custom scripts and is providing test-execution services for the three DNA updates per year. Fiserv reviews the release notes and identifies areas potentially affected by the updates.

"The Fiserv UAT team provides a comprehensive review of the DNA release notes," Fowler said, "and gives Rally CU the opportunity to provide feedback and final approval before testing begins."

Credit Union Looks to Build on Success


Rally CU's user-acceptance testing went from manual and task intensive to efficient and seamless. The speed and accuracy of the automated testing has improved the organization's confidence in deploying new software.

And those software updates are getting to market faster. The 360 hours the credit union used to spend testing a software release has been reduced to less than 25 hours. That amounts to more than eight weeks per release that Rally CU can reallocate to other projects.

"We are so pleased with the outcome of the testing," Fowler said. "We are considering adding additional test cases so we can incorporate testing with our online banking application."

Connect With Us

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