



Aprío impact at Point West Credit Union.



Point West Credit Union

Location: Portland, Oregon

Established: 1932

Profile: After being on the brink of closure during the recession, Point West rebuilt its capital and strategic focus. Today, Point West has \$100M in assets under management.

How can a small credit union with limited resources rise to the top? Community credit unions face fierce competition yet can be slow to innovate, fearing that they'll leave behind old-fashioned strengths in the process.

This case study with Point West Credit Union explores how a small, once-struggling, credit union has used Aprío technology to achieve more productive meetings with better attendance, and reduced the time and inconvenience of meeting preparation.

The challenge

Point West has emerged as an innovator among American credit unions, having come through a decade of asking non-stop 'how can we move our credit union forward?' Along that journey, technology became a key success factor.

One of Point West's most recent technology decisions was to reassess their board portal, which the board found highly cumbersome. As Point West Credit Union CEO, Amy Nelson explains, "Neither our directors or management team wanted to use our old board portal software, because it took an inordinate amount of time to load, download or organize documents, was not intuitive, and lacked mobile compatibility. Just having technology doesn't help you; it has to be the right technology which is user friendly, fun to use, and can be easily enhanced over time."

The approach

Point West discovered Aprío while on a task force on innovation with other respected U.S. credit unions. When Point West saw a presentation of the Aprío board portal – there was an immediate sense it could save directors and administrators time. "The design and functionality was logical. Actions made sense like If you need a board member to sign minutes – there's a pen icon right there to do that. We could envision board members logging in from desktop or mobile devices and wasting no time pinching and resizing screens. In many ways, we saw ways to connect better and save our time," describes Nelson.

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AMY NELSON, POINT WEST CREDIT UNION CEO

A cautious spender, Point West assessed several board portal solutions, taking a hard look at the value. Their conclusion after the evaluation was to select Aprío. "Compared to other portals, Aprío offered the biggest bang for the buck providing the same extensive security of more expensive portals as well as providing training and unlimited support at no extra cost," says Nelson.



**Key results:**

Meeting prep time reduced by ~85%

More efficient pre-meeting engagement

Better meeting attendance

The impact

After eight months using Aprío, Point West has experienced measurable gains in board meeting productivity and director engagement and ease of administration.

“Directors being able to collaborate with each other prior to meetings, has made us more productive as a board, kept meeting agendas on track, and boosted attendance as a result.”

AMY NELSON, POINT WEST CREDIT UNION CEO

Meeting quality & director engagement

“The biggest win with Aprío is how much we’ve improved pre-meeting engagement, which has led to more productive meetings and better attendance,” explains Nelson.

- The way Aprío pushes out our agenda and meeting reminders right to people’s inboxes, prompts directors to prepare more thoroughly, in advance, resulting in informed, succinct, and decisive discussion at meetings.
- Aprío makes it easy for directors to pose questions to management before meetings with answers shared to all. This has virtually eliminated the repetitive background questions, which often eat time in meetings.
- Directors being able to collaborate with each other prior to meetings, has made us more productive as a board, kept meeting agendas on track, and boosted attendance as a result.

Meeting administration

“We’ve won back time and gained flexibility with our meeting prep. It used to take the effort of 6 people to get board packet elements all posted and our process demanded we all be working together at one time for 4 to 8 hours,” adds Nelson.

- Using Aprío, we can create the board packet and corresponding email communication in under two hours – our last packet took less than one hour.
- The way Aprío works frees us to do things more flexibly. Different committee leaders and members of our management team prep our board report independently, when time permits. At the post deadline, our administrator goes in and everything is there, easy to unify and distribute. Then instantly, directors can see the full board package anywhere, and on any device.

Technology adoption

“Aprío provided ongoing training that is exceedingly practical – focusing on the different actions each of us needs to perform,” says Nelson.

- We had several follow-ups and focused training sessions, often just 30 minutes. Small practical steps have returned big gains.

A final encouragement from Nelson: “Small credit unions, don’t mistake technology as something useful only if you’re big. Aprío combines broad functionality and affordability. That combination is key for innovation even if you are a \$10-million credit union.”



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Aprío makes good governance simple and affordable. The Aprío board portal helps organizations large and small to efficiently run board meetings, keep directors up to date, and keep information secure. Aprío provides premium features without premium pricing, all delivered with unmatched service. Visit www.aprio.net to learn more.