



SUCCESS STORY

Legacy Bank, Oklahoma City, OK
Carolyn Fulton, HR Support Administrator

Founded in 1908 in Hinton, Oklahoma, Legacy Bank still stands in its original location today. After more than a century in business, Legacy Bank has 11 branches and is 230 employees strong. Their corporate logo is an acorn silhouetted against the backdrop of an oak leaf representing not only a bank with deep roots in Oklahoma's rural communities, but one with a strong commitment to helping customers establish financial legacies of their own.

Problem:

Legacy Bank had been using Sage Abra Software and it became increasingly more difficult to use throughout the years. Carolyn Fulton, Legacy Bank's HR Support Administrator, often wondered if the data changed on its own and found the system to be neither accurate, nor dependable. Reporting was cumbersome and they found Crystal Reports very hard to work with as well. Their former Sage business partner recommended they make the conversion to the SQL system that Sage offered, perhaps in hopes that a more current version of the software would take care of their problems. They began implementing Sage HRMS (SQL) in May of 2016 and were not able to run the first payroll in that system until December of 2016. By the time their system was about to go "live" on Sage HRMS in January of 2017, they found it very unsatisfactory, and immediately began looking for a permanent replacement.

Search for a Solution:

The HR and payroll administrators at Legacy Bank were instructed to take several weeks to look for a new payroll system and therefore reviewed several companies. It was at this time that Carolyn Fulton, HR Support Administrator, received an email from Hagel & Company about the challenges of converting from Sage Abra/HRMS. Carolyn stated, "bells went off and I knew I needed to talk with Hagel & Company about Optimum HRIS."

From the first demonstration of Optimum HRIS, the Legacy Bank team felt that they had discovered the perfect solution, backed up by the knowledge and experience of Hagel & Company. They knew they wanted to maintain the control of having an on-premise solution. Legacy Bank used EmpowerTime for time-keeping. This, too, was a system that Hagel's team had a great deal of experience in successfully interfacing with Optimum. Jeff Moan, Senior Project Manager at Hagel & Company, is multi-faceted in his knowledge of Sage Abra/HRMS as well, which allowed him to easily integrate the two systems.



The Implementation:

Having just gone through a very painful seven-month implementation of Sage HRMS, Legacy Bank was very concerned about jumping right into a new implementation. Carolyn was “dreading” the process, but she soon found that the Optimum implementation would be quite painless. She states that she was amazed at how quickly and smoothly it went. She was surprised at being assigned homework as part of the process, but promptly realized that it gave her great familiarity with the system and now she says she is not afraid to jump right in and use it. They began the process of implementing Optimum in mid-February and ran their first payroll in the new system on March 10th.

Jeff Moan, Carolyn’s Project Manager, was “so wonderful and patient” that she wanted to stay with Jeff even after the successful go-live. She quickly points out, however, that her dedicated account manager at Optimum is also wonderful!

Results and Benefits:

Carolyn attests that the payroll and timekeeping processes now go much faster. As part of the implementation process, the Hagel team designed export tools in the Optimum system which refreshes and exports to other systems automatically instead of having to do manual processes. The Optimum SQL database is easy to work with and simple Excel queries were set up for the Bank’s needed exports. The payroll is now so straightforward, with several fewer manual processes, that Carolyn says she worries she has forgotten something!

Not only are custom exports easily set up, but the Bank finds most of what they need already built into the system. One example of this is the required HSA export built-in Optimum report. In their old system, they attempted to build that in Crystal Reports and it could never be done correctly.

The accounting department at Legacy Bank is also much happier with Optimum because they are now receiving one report instead of four out of their old system.

Legacy Bank concludes with “we can’t say enough good about it.” The CFO of Legacy Bank is also delighted with Optimum and recently said to Carolyn, “thanks for being persistent about getting a new system.”

FOR MORE INFORMATION ABOUT OPTIMUM HRIS OR HAGEL & COMPANY,
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VISIT OUR WEBSITE AT WWW.HAGEL.NET