



Case Study

Unilever Federal Credit Union leverages the power of managed services to enable transformation

Client

Unilever Federal Credit Union

Unilever Federal Credit Union is a full service, single-sponsor, non-profit financial institution. The credit union is owned by its members and has a member-elected board of directors. For over 70 years, Unilever FCU has provided financial services to its members and continues to grow in assets and services. The credit union is sponsored by Unilever and is a member of Alloya Corporate Federal Credit Union. Alloya provides comprehensive credit union services, including approved compliance package materials to credit union member-owners, through its partnership with CBTS cloud and managed service solutions. This relationship enables Unilever FCU to leverage Alloya's compliance acumen and decades of data center experience from CBTS in the credit union industry.

| Challenge | CBTS solution | Results |
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| <ul style="list-style-type: none"> • Unilever FCU had to relocate and separate from their corporate sponsor's network • The financial institution had to deploy its own network and address regulatory requirements • The credit union required modern, enterprise-class IT for growth and evolution • Limited internal staff to manage a complex and secure environment • Required in-depth data protection strategy supporting the needs of a financial institution | <ul style="list-style-type: none"> • CBTS assessed the current environment and established success-based business objectives • CBTS helped develop policies and assist with secure network design and deployment • Primary production environment resides in a fully managed high availability CBTS cloud environment that has been audited regularly • Secondary offsite data backup and full data replication for Disaster Recovery mirrored in a CBTS data center. • Documentation and annualized testing of the DR with a letter of attestation confirming its success | <ul style="list-style-type: none"> • Letter of attestation proving Unilever FCU is committed to ensuring the credit union is protected against downtime and loss of data • CBTS ensured the credit union had redundant network access through secure Internet that could be accessed anywhere. • Leveraged Alloya/CBTS credit union experience to establish regulatory documentation addressing stringent compliance requirements • With fully managed hybrid data center and network in place, internal IT staff can focus on delivering outstanding member experiences |

Challenge

Under the direction of their corporate sponsor, Unilever Federal Credit Union was moving their head office, giving them an opportunity to look at the way they were utilizing IT. If they needed to make a change, this was the time to consider it.

In order to address the difficulties in meeting financial compliance requirements, credit union auditors advised the Unilever FCU to move to an independent data hosting solution.

With their small and often overtaxed IT staff, Unilever FCU needed an alternative option to deploy and maintain a secure network infrastructure, a high availability production environment, as well as data protection for backup and disaster recovery.

Unilever FCU consulted with their Senior Business Consultant from Alloya Corporate Federal Credit Union for their advice and experience helping other credit unions leverage a managed services model. That's when Alloya introduced the credit union to CBTS.

CBTS solution

CBTS took the time to understand Unilever FCU's current environment and proposed a fully managed hybrid data center and network solution. CBTS designed a high availability cloud for production, data protection services for backup and disaster recovery, as well as managed services for remote network monitoring and management.

Unilever FCU worked closely with CBTS to design the environment and define ongoing responsibilities for delivering data protection solutions that are tested and proven to work. CBTS manages and monitors authentication to the Unilever FCU network based on the group policies developed. Production was set up in a high-availability, multi-tenant cloud with managed backup and disaster recovery services at multiple CBTS data center locations.

Managed services experts guided their staff on how to pull reports for auditors to show that their network configuration adheres to regulatory compliance requirements. Additionally, the managed services team continues to assist with third-party integrations and any ongoing Unilever FCU support needs for managing their new environment.

Results

Unilever FCU is well positioned for continued growth as they leveraged a due diligence framework and all the supporting documentation as the foundation for addressing credit union compliance and regulatory standards.

"With CBTS, the attention to detail really stood out to us," said Jim Kopfensteiner, CEO of Unilever FCU. "They were able to advise us on many topics, from real-time input during auditor exams to IT information security policies."

"Their ability to bring people together from different organizations toward a common goal proved crucial to our success," added Carlo Constantino, Unilever FCU's Associate Finance Manager. "CBTS made it easier to implement the changes that make us more secure. We were impressed with their project management and their ability to explain the intricacies of the process."

With CBTS's technology experience in the credit union industry, when combined with Alloya's expertise, Unilever FCU has everything they need to strengthen their security continuously while freeing up their IT staff to focus on providing better services for their members.