

Heritage Building Society

Heritage Building Society is Australia's biggest building society. With a history going back to 1875, Heritage is an authorised deposit-taking institution under the Banking Act, similar to banks, building societies and credit unions. Toowoomba-based Heritage is a mutual company, owned by its members rather than shareholders, so instead of pursuing massive profits, its focus is on putting People First.



BUSINESS PROBLEM: OUT-DATED SYSTEMS WERE HINDERING COMMUNICATION

Australia's largest building society: Toowoomba-based Heritage Building Society is Australia's biggest building society, an organisation owned by its members. Heritage <http://www.heritage.com.au> offers members a network of 130 retail outlets throughout south east Queensland, as well as broker services in New South Wales, Victoria and South Australia. In 2009-10, Heritage reported a profit of \$29.89 million and approved loans of \$1.32 billion.

People First: Customer satisfaction with Heritage rose to 92.4 per cent, as measured by the Morgan Research Consumer Finance Survey) in the six months to June 2010. Heritage Building Society is a mutual company owned by its members, not shareholders, so rather than pursue massive profits, the organisation's focus is on putting People First.

Heritage Building Society

Financial services

Applications: Intralogic

"Heritage does put people first, both our customers and our employees, so the open communication that Intralogic provides has been an important building block in using technology to contribute to that culture."

David Johnston
Project Manager
Heritage Building Society

Heritage Building Society

The need for change: With a current total of 700 employees and an additional 70 people at its community branches, Heritage is a large and geographically distributed organisation. In 2005, it recognised that existing internal communication systems were incapable of supporting the organisation as its continued developing to meet its customers' needs.

Communications is the key: Until then, Heritage relied on a range of fairly limited systems to maintain communication between head office and branches in the company's widely dispersed network. Maintaining up-to-date versions of current branch procedures manual was a cumbersome combination of limited online access and manual printing and posting of procedural documentation.

Difficult to access procedures: Heritage's core banking system provided access to banking branch procedures through Telnet sessions. As well as being a clumsy way to access information, this system required a software programmer to maintain it. Another system stored details of branch procedures in alphabetically ordered HTML files, which were accessed with a web browser.

Manual printing and limited email: A third system involved printing and posting to every branch hard copy updates of the branch procedure manual. Frequently, full sections would need to be reprinted to maintain the order of page numbering. While email was used for communication, only branch managers and supervisors had email access, which made it of limited value.

Holding back progress: Heritage Building Society Project Manager David Johnston said those limited communication systems were definitely causing pain. "Lack of access to current procedures became a real problem when we received non-standard queries," he said. "It also took a lot of effort to keep the branch manuals up to date which made it difficult to respond rapidly to a customer's needs."

WHY WEBLOGICS: WEBLOGICS PROVIDED RICH OUT-OF-THE-BOX FUNCTIONALITY

Web-based knowledge management: Heritage Building Society decided to replace these systems with the Intralogic web-based knowledge management solution from Australian company Weblogics. Heritage chose Intralogic through a competitive tender process because of its rich feature set, great value for money and the responsive approach of Weblogics. Since then, Heritage has worked with Weblogics to customise the software to continue meeting its needs.

Intralogic manages knowledge: Intralogic stores and shares an organisation's collective knowledge, allowing customers to quickly, easily and affordably create Intranet, extranet and Internet knowledge sites. Intralogic has seven core components that work together seamlessly: Content Management; Document Management; Online Forms Management; People Management; Business Workflow Management; Enterprise Searching; and Knowledge Management.

Out-of-the-box functionality: Intralogic is functionally rich right out of the box, requiring no additional development. The 100 per cent browser-based system is template and database-driven, based on World Wide Web standards and database technologies from Microsoft and Macromedia. This makes Intralogic



"We use The Hub as a portal to link to a lot of other systems, such as our IT incident logging site. It is a simple to use system and it is easier to train people about how to use one source of truth. We train them on The Hub – Intralogic – as their first port of call to find something. On average, every staff member looks at The Hub at least once a day – and many keep it open on their computer throughout the day."

David Johnston
Project Manager
Heritage Building Society

Heritage Building Society

solutions open, intuitive and extremely easy to use by all employees, even those with no technical skills.

The Hub: Heritage Building Society refers to Intralogic internally as “The Hub”, because it provides the central focus for the organisation’s online communications. “We use The Hub as a portal to link to a lot of other systems, such as our IT incident logging site,” said David Johnston. “It is a simple to use system and it is easier to train people about how to use one source of truth. We train them on The Hub – Intralogic – as their first port of call to find something. On average, every staff member looks at The Hub at least once a day – and many keep it open on their computer throughout the day.”

Online access to procedures: Heritage uses Intralogic to provide extensive online access to HTML-based manuals for HR (Human Resource) and branch banking procedures. As well as immediate access to current procedures from throughout the Heritage banking network, Intralogic provides a single location for updating content, which eliminates the problem of staff accessing out-of-date documents.

Building an inclusive culture: Heritage also uses Intralogic for a range of important but non-urgent staff communications including Employee of the Month announcements; details of staff rewards programs; internal job opportunities, details of all internal training opportunities and fortnightly staff newsletters. In addition, The Hub contains an internal telephone directory; an Organisation Chart and a Marketing Toolkit, which contains details of brochures, promotional collateral and information about planned marketing campaigns.

Evolving to meet needs: David Johnston said The Hub had continued to evolve to meet Heritage’s needs. “An item of custom development was our Staff Classified section which members of our staff use a fair bit,” he said. “This allows them to place items, such as ‘Uniform for sale’ ads, that would just annoy people if they were sent around as an email. That was a custom development for Heritage that has found its way into the general Intralogic product. Another was the streamlined People Search capability. We’ve also evolved the look and feel of The Hub to align it with the Heritage brand as it has developed. Weblogics is very open to listening and taking on feedback.”

BUSINESS BENEFITS: IMPROVED TWO-WAY COMMUNICATION

Extensive use by staff: The Hub is used every day by Heritage’s 700 members of staff. Sections of the system are also accessed by an additional 70 people who operate the society’s ‘mini-branches’, effectively Heritage counters run by agents who can use The Hub to download marketing materials and forms. For smaller communities, these mini-branches provide a local face for Heritage.

Immediate benefits: Mr. Johnston said an important benefit of Intralogic is that it delivered almost immediate benefits out of the box. “You get many of the benefits of Intralogic straight away,” he said. Also, there is plenty of deeper functionality if you go looking for it. Weblogics is very helpful technically. They assist us to get the most out of the Intralogic product. We have very few issues with the system, but when we change something, they are very accommodating.



“We’ve evolved the look and feel of The Hub to align it with the Heritage brand as it has developed. Weblogics is very open to listening and taking on feedback.”

David Johnston
Project Manager
Heritage Building Society

Heritage Building Society

Two-way communication: Mr. Johnston said Heritage had clearly benefitted from improved communication within the organisation. “A clear benefit is that we have improved control over some of these important corporate knowledge areas such as maintaining branch procedures,” he said. “We also benefit from more effective communication both ways: An example is that we utilise the forms part of Intralogic for a number of activities such as collecting feedback on training.”

Weblogics is easy to work with: “Weblogics is definitely easy to work with,” said Mr. Johnston. “Weblogics has proved to be very accommodating as far as listening to our suggestions about the product and incorporating those suggestions in their subsequent development. They are very open to ideas. We would recommend both Weblogics as a company and Intralogic as a good product to consider as an Intranet portal.”

Future plans: Mr. Johnston added that Heritage was in the process of upgrading to Version 9 of Intralogic. “We intend to add social media functions with our upgrade to Intralogic 9,” he said. “We are really looking forward to new functions such as RSS and the blog capability, which will replace using staff newsletters for new projects. Previously, when we’ve had big organisational changes such as providing new desktops to all staff in branch networks and migrating internal phone numbers from three digits to four digits, we have emailed newsletters to staff as part of the project reporting. With the next version of Intralogic, we’ll replace that with a blog. It’s not as expensive and more relevant, so people can subscribe to the blog if they want to know more about the project. Also, we are looking forward to the workflow capabilities of the newer version.”

Enhancing an open culture: Mr. Johnston said Intralogic was part of the “People First” culture at Heritage. “Heritage is a place with a very open culture and quite a flat management structure,” he said. “Intralogic enables us to publish details of staff anniversaries and birthdays on home page of the Intranet as well as details of our Employee of the Month announcement. Heritage does put people first, both our customers and our employees, so the open communication that Intralogic provides has been an important building block in using technology to contribute to that culture.”

Call Weblogics on 02 9929 0777 or visit www.weblogics.com.au for more details.



“You get many of the benefits of Intralogic straight away. There is plenty of deeper functionality if you go looking for it. Weblogics is very helpful technically. They assist us to get the most out of the Intralogic product. We have very few issues with the system, but when we change something, they are very accommodating.”

David Johnston
Project Manager
Heritage Building Society