

White Paper

# Applying Agile in a Credit Union Environment

## What Does this White Paper Cover?

To keep pace with digital advances and their members' ever-evolving expectations, credit unions are looking to agile project management methodology to enhance in-house development and improve workflow with their technology partners. This dynamic and iterative approach to project management offers an alternative to traditional waterfall processes, with the promise of flexibility to add or adapt new features quickly based on feedback from members and colleagues in other business units.

This white paper presents:

- a brief history of agile methodology, principles, and practice—from its inception in 2001 to its more recent emergence in the financial services industry,
- how to adopt an agile approach that organizes and empowers self-governing teams to take on projects that add value,
- how to open feedback loops with members and staff, and building cognizance of the changes that will be necessary to nurture an agile culture, and
- in-depth use cases of agile methodology within four credit unions.

The experiences of the credit unions contributing to this white paper illustrate the advantages a cooperative business model inherent to embracing agile and the challenges in realizing its full potential.

## Top 3 Takeaways

- 1 It is easier to start small and build on success, gaining organization buy-in as deliverables come to fruition.
- 2 Agile methodology allows credit unions to respond to member needs quickly, by incorporating their feedback on a compressed timeline.
- 3 Breaking up a substantive change into smaller deliverables allows for end user testing and feedback.

## Contributor Profiles



**David Luchtel**  
Vice President of  
Information Technology

WSECU  
Olympia, WA  
\$3 billion in assets  
279,000 members



**Roger Mellor**  
Vice President of  
Information Technology

My Community Credit Union  
Midland, TX  
\$442 million in assets  
36,000 members



**Chris Parker**  
Executive Vice President/  
Chief Operating Officer

Partners Federal Credit Union  
Burbank, CA  
\$1.8 billion in assets  
173,000 members



**Jeffrey Staw**  
Chief Digital Officer

Open Technology Solutions, LLC  
Centennial, CO

## Where Can You Find the White Paper?

**Council members** log in to [www.cunacouncils.org](http://www.cunacouncils.org), then click white papers in the resources pull down menu

### Not a Council member yet?

Join: [join.cunacouncils.org](http://join.cunacouncils.org), and gain access, along with 100s of other white papers and a suite of exclusive member benefits.

“

A lot of people think agile means running without any structure, but in my experience, agile means to work in a very constructive way and fail fast, but that doesn't mean to completely cut out process.”

**Roger Mellor**  
My Community  
Credit Union