

Customer Success Story

Pima Federal Credit Union Teams with Intuitive TEK to Expand Financial Reporting and Budgeting Process



Pima Federal Credit Union is a not-for-profit financial cooperative that offers competitive, low-fee loan and deposit rates. It provides savings accounts, checking accounts, money markets, CDs and IRAs. Members enjoy relevant, financial solutions that help them achieve financial success. Pima prides itself in delivering the highest possible value to members in the simplest way and believes that a great financial institution is about relationships—not transactions.

Pima's value promise:
 Smart Solutions. Simple Banking.
 Personal Interactions.



Swift, ongoing support from Intuitive TEK's collaborative staff is the key to Pima Federal Credit Union's success with Adaptive Insights.

In the fast-paced world of finance, credit unions need speedy financial reporting in-house and for their clients. This was not possible before Pima Federal Credit Union started using Adaptive Insights—reports used to take up half the work day—but Adaptive Insights significantly cut down on running time. Now Pima can create slick reports in attractive formats and benefit from a no-fuss budgeting process. Specifically, Pima uses Adaptive Insights for internal financial reporting and monthly cost center budget variance. Pima also provides its membership with NCUA Lobby reports and annual reports. Pima Financial Analyst Jeremy Norville explains, "Adaptive Insights allows us to quickly and easily create, modify and run financial reports as well as almost any other reports that you might want." But for Pima, the key that opens all doors to Adaptive Insights is Intuitive TEK.

When Norville started working at Pima in 2014, he had no prior experience with Adaptive Insights, so he had to learn it on the fly. Adding to the challenge, his Adaptive Insights-savvy predecessor had parted ways, so he was tasked with figuring out Adaptive Insights on his own—or so he thought. He soon learned he had access to a vital resource—Intuitive TEK. Thanks to Adaptive Insights' ease of use and Intuitive TEK's know-how, he was up and running in no time.

Intuitive TEK's continued support keeps Pima on course. Norville's go-to for all things Adaptive Insights is Intuitive TEK Senior Consultant Brian Davis: "Anytime I ever have a question, I reach out to Brian. He's very responsive, very knowledgeable with the product and usually knows [the solution] right off the top of his head."

Norville appreciates Intuitive TEK's willingness to collaborate when troubleshooting. Pima had a couple issues with problematic builds from former employees. Norville brought this to Davis' attention, and the two brainstormed ideas: "If I don't have the right answer, he gives me the right answer," Norville declares. For him, Intuitive TEK is instrumental in unlocking Adaptive Insights' lesser known ins and outs.