# Corning Credit Union × Customer perspective

# Credit Union Case Study

CUSTOMER INTERVIEW QUESTIONNAIRE

How a credit union deployed Tursio for structured data search: The real experience, the challenges, and what it made possible.

tursio

# THE PROBLEM

Data requests took weeks,
If they got asked at all

**TOM FOSTER, CORNING CU**
VP of Product and Project Management

Before Tursio, how long did the data requests take for member insights? How long does it take now?

Our normal process for a non-urgent data request was to have a ticket opened, vet it with our intake committee and schedule it for the next sprint or put it in our backlog. This could mean a two-to-three-week turnaround time and often the results prompted more questions. By the time the data could be delivered, the requester had often lost focus on the problem. A lot of questions simply didn't get asked because it isn't worth the trouble.

With Tursio, we are showing users they can ask questions themselves and get immediate results and then refine the question to dig deeper or go in a direction they had not anticipated based on what they find. By connecting a credit union leader directly with the member data, a conversation can occur that is simply impossible when a technical translator writing SQL has to be involved.

The structure of our core system data, where most of the relevant member data resides, is difficult to work with in its native form. A combination of building data cubes and exposing them to natural language queries using Tursio unlocks tremendous potential for people at all levels of the credit union to better understand members' needs.

# THE SYMITAR CHALLENGE

Flipping an Account-Centric Model

Before Tursio, how long did the data requests take for member insights? How long does it take now?

Symitar is a common, robust core system for transactions but it is not designed for business intelligence use. It uses an account centric data model, with name records of the joint, prime and other members under the account.

This means the same person can have multiple name records across several accounts with unintended variations in metadata like street addresses.
"13 Main Street" vs. "13 Main St."

We serve and communicate with people, not accounts. It is necessary to flip that model so accounts roll up to members. We solved this internally with a system our CIO devised that effectively produces a householding process we can use to aggregate accounts by a member's relationship.
We primarily did this to implement Salesforce, but it made implementing Tursio much easier.
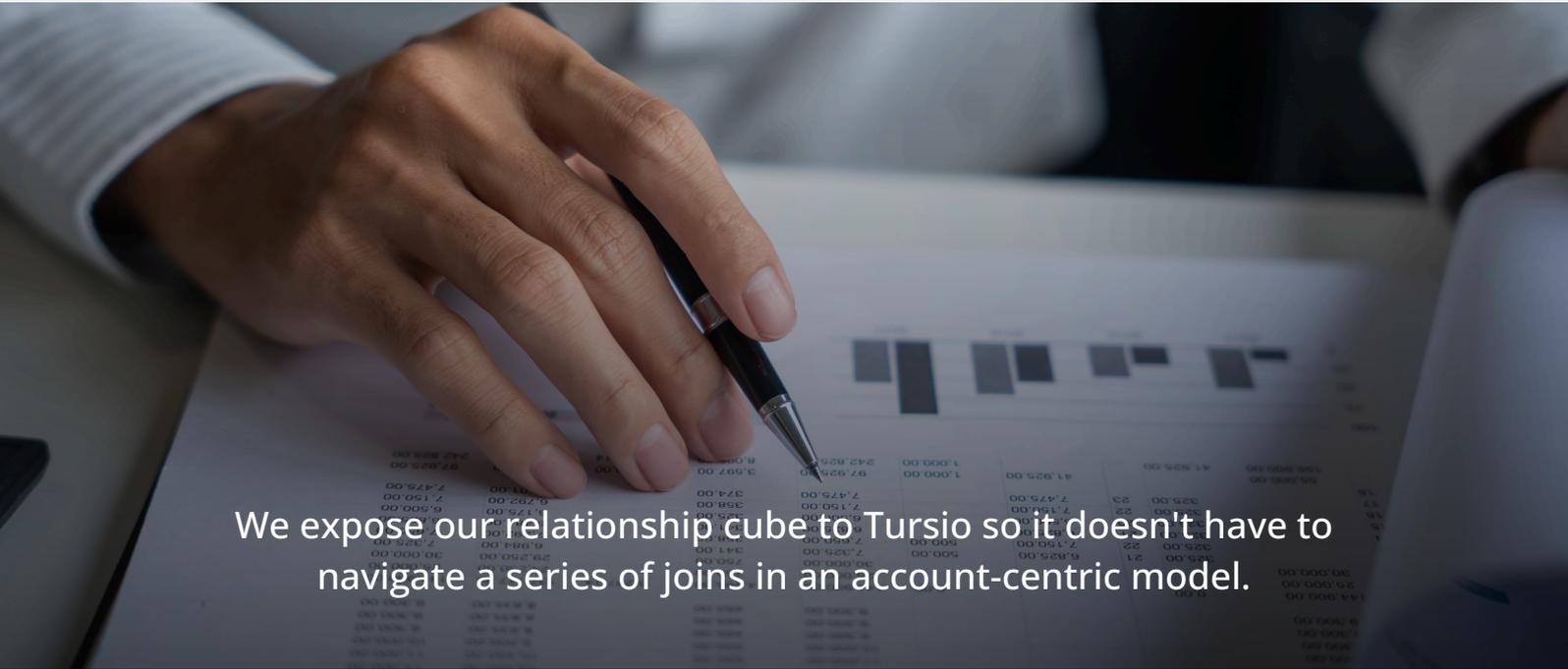
We expose our relationship cube to Tursio so it doesn't have to navigate a series of joins in an account-centric model.

# THE DATA FOUNDATION

Building towards a single source of truth

We have been improving our internal on-prem data warehouse for some time and have started using Salesforce Data360 in the past year.

Creating data cubes helped to consolidate the queries that touched many tables and provide us with a data source that integrates not only Symitar data, but data from our other applications, like digital banking. These cubes are being used for reporting out of SSRS, Tableau, Salesforce and Tursio to help ensure we have a single source of truth.

While this data is helpful to our data and product teams, many business users still can't self serve with this data due to technical and/or licensing constraints.

Had you gone through any data modernization efforts (e.g., data warehouse, Jack Henry Data Hub) before Tursio? What gaps remained to enable business users?

## THAT GAP IS WHAT TURSIO WAS BROUGHT IN TO CLOSE.

# WHY TURSIO?

Security, Schema Fit, and the Right Approach to SQL

AI is well suited to write SQL from plain language queries if it has good schema data. Tursio allows us to do that in a private, secure setting with minimal overhead.

> 66 In early 2025 we wanted a solution that completely walled off our data from anything external. So Tursio was the most compelling option for data privacy.
>
> **-TOM FOSTER**

**How would you describe the accuracy of the results your team is getting from Tursio compared to your previous process?**

Our use cases are still limited, and we have rolled out slowly because we only have one chance for Tursio to make a first impression with the team. Success with Tursio depends on the team trusting the data it provides.

We did a lot of training on the model to teach it to tell users what it knows and does not know. It can respond with 'dos and don'ts' policy on how it should be used. We have extensive member data available now but we plan to add trending member data, transaction data and other data sets throughout this year.

**RIGHT-SIZING**
**Built for a small data team**

Yes, we like the level of control we have over the model as well as the simplicity of deployment.
We have a small data team.

The support from Tursio has been great. The team has been great to work with. Any questions or issues we have had were fully addressed. These were not just with bugs or training, but with enhancement requests.

**How does Tursio fit the size and resource profile of your credit union? Is this something a team your size could realistically adopt and maintain?**

Is there anything about how the Tursio team operates that stood out to you, positively or otherwise?

"

*We think the technology has great potential to help credit unions and they (Tursio) seem eager to help their customers learn from one another's experiences.*

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Who at your credit union could use Tursio most, and how will it change their day-to-day work?

## FROM PRODUCT MANAGERS TO BRANCH LEADERS

It already is heavily used by product managers to identify the size of segments we are considering for marketing or special offers. We also have some support areas that are starting to use it for operational purposes.

You can identify members turning 18 or members who have an account combination that should not have been allowed. We are planning to roll out to branch leadership so they can quickly spot any key relationships that need attention.

We hope this can replace some manual pulling of reports, but it will take time to develop the trust needed to retire the legacy processes completely.

## Advice to Other Credit Union Leaders

It is easy to get enamored with what the technology can do, but one misunderstood question can sour a user from returning and build on impressions about AI that are already in place. Be clear about what it can and cannot do, and what they should and should not do with the answers.

**CCU** Corning Credit Union **✕** **tursio**

Tursio is a structured data search platform that enables business users to query operational databases in natural language with no SQL required.

By automatically generating a context graph from existing data structures, Tursio delivers accurate, trustworthy responses while deploying fully on-premises to meet the data privacy and compliance requirements of regulated industries

## GET IN TOUCH

To learn more or request a free trial,
contact us at info@tursio.ai or visit tursio.ai