



Customer Success Story | Hyland Global Services

## First Bank

Partnering with Hyland enables rapidly growing community bank to transform capabilities and performance of automated banking solutions

First Bank, a full-service community bank with more than 100 branches across the Carolinas, turned to Hyland in 2012 for an electronic document storage and retrieval solution amid a rapid series of mergers and acquisitions.

### The Challenge

“We went from 23 branches and knowing absolutely everybody...and then we added 25 branches on the east coast of North Carolina overnight,” says Jeannie Kearns, Vice President of Document Imaging.

Kearns knew that OnBase, Hyland’s content services solution, had exponential possibilities for automated document management, workflow and extending visibility into processes. But the bank was growing so fast, and effective merging of the different processes and systems was so critical, that she knew she needed to gain a deeper understanding of OnBase capabilities to ensure long-term success.

What strategies would allow her to optimize business processes across the organization? How could she make sure she was getting the most out of their solution? Kearns needed expert guidance.

### The Solution

Hyland’s Global Services team stepped in with a three-pronged approach centered on a commitment to partnership: routine system assessments, technical mentoring and collaboration, and continuous training and education.

FIRST BANK

#### CUSTOMER

First Bank

#### INDUSTRY

Financial Services

#### SIZE

5.5 billion in assets

#### LOCATION

Southern Pines, North Carolina

#### SERVICES UTILIZED

Enterprise Assessment, Staff Augmentation, Education Services

**“Without that assessment we would have never had the conversations that prompted critical performance improvement areas. In fact, we needed to conduct an upgrade and I said I don’t want to upgrade until we get the system assessment done.”**

Jeannie Kearns, Vice President of Document Imaging, First Bank

### **Benefiting from assessments of the solutions and infrastructure**

The benefits of engaging the Global Services teams were clear from the first system assessment. With periodically scheduled assessments of architecture and solutions, Hyland consultants also sit with users in varied job roles at the bank, and talk about how the solutions are working for them and what they’d like to be able to accomplish.

The team is also able to assess the infrastructure needs and make recommendations that accommodate growth agendas and changes to business processes. For example, they discovered there weren’t enough processing resources for the constantly growing work load and corrected that, ensuring optimal capacity scaling. In addition, Kearns was able to eliminate several workflow items that were causing performance hits to the system.

Then, the biggest win: the assessment team suggested creating Unity Scripts to replace web service-enabled autofills that were central to the workflow.

Suddenly, the retrieval time went from half a minute to a tenth of second. Kearns said, “The next day I got so many emails from people saying things like, “I don’t know what you did but this is amazing...it’s so fast!”

### **Building a true partnership**

For the first workflow build, Kearns wanted to understand the reasoning behind each step and to speed up the process. Hyland sent a dedicated workflow engineer technical consultant onsite to develop the solution with her.

“He sat across my desk for three weeks straight,” Kearns said. “He’s been a super resource. And I have the resources just a phone call away should I need help with any of the solution areas we built together.”

The services’ engagement truly delivered the customized solution that met First Bank’s needs. It also built solid foundation for a trusted relationship that is ongoing.

### **Advancing education and training**

It doesn’t stop with site visits. Hyland’s training and education component—Education Services—allows Kearns and her team to increase their competency and confidence in developing workflows and addressing business processes.

Kearns has leveraged many training opportunities (instructor-led, onsite, online and on-demand training, and the CommunityLIVE user conference) to advance OnBase as an enterprise-wide supported application that handles workflows for almost every area of the bank. She is certified as an OnBase System Administrator, Workflow Administrator and WorkView Administrator, enabling her to truly take ownership of the enterprise-wide Hyland solutions at First Bank—including electronic workflows for document-heavy areas like retail loans, as well as deposits, signature cards, resolutions, IRA and CD.

Hyland’s diverse training offerings provide the exact building blocks of knowledge when they are needed to solve a business problem. They also meet the content needs, the timeframes and the budgets available.

**“The hardest thing for departments to understand is that we can do just about anything. There’s not a whole lot in optimization asks that I haven’t been able to deliver for our people.”**

Jeannie Kearns, Vice President of Document Imaging, First Bank

For example, by watching Quick Looks, a free on-demand video training resource, Kearns taught herself how to use WorkView to build an application for the project management department in four days. It’s still used to this day.

### The Difference

#### **A technology partner, not just a technology vendor:**

From the beginning, Hyland Global Services consultants have empowered Kearns in a way that boosted both her proficiency and professional development. Working side-by-side with experts, she has learned how to identify oncoming challenges, assess the impact of evolving requirements and develop world-class information management solutions.

Today, Kearns is confident that should she ever have a question, there will be someone within reach, with an answer. In addition to her relationship with the Global Services team members, there are myriad resources available, including the online Hyland Community where solution developers and Hyland experts in all roles interact with customers online.

Hyland even offers on-demand consulting services where customers can schedule to have Hyland resources available for critical projects, including upgrades, solution go-lives or even solution development support.

**Proactively optimize for the future, continually improving:** First Bank has consistently been able to adjust and optimize its infrastructure and solution capabilities ahead of growth. Additionally, the relationships, methodologies and strategic knowledge Kearns has fostered enable Kearns and her team to continually improve workflows and create better performing solutions across the organization, ensuring positive outcomes into the future.

“It’s funny, the hardest thing for departments to understand is that we can do just about anything. There’s not a whole lot that I haven’t been able to deliver for our people.”- Jeannie Kearns, Vice President of Document Imaging, First Bank.

To learn more, email [GlobalServices@Hyland.com](mailto:GlobalServices@Hyland.com) or visit [OnBase.com/Services](https://OnBase.com/Services) »