

The Power of Project Management: Alliance Bank & Trust proves with the right partner you can successfully integrate with limited resources

Challenge

When Gastonia, NC-based Alliance Bank & Trust entered into a service agreement with Chattanooga, TN-based Millenium Bank, the directive was to try and use the same vendors. Alliance was previously outsourcing their statements, utilizing different vendors for both physical and E-statements. Since they were not using the E-statement vendor's digital banking platform it was very hard to give feedback and reporting required an extensive manual process. In addition, the statements were extremely basic with limited thought put behind the design.

Alliance was very happy with its Q2 digital banking platform and did not want to switch digital banking vendors. When looking into using HC3 for their statements, they were pleasantly surprised to learn that HC3 was already working with several banks using Q2 for the digital banking platform.

With the Q2 integration capabilities and the encouraging review from long-time HC3 customer Millenium Bank, Alliance decided to move forward with HC3.

Solution

Once contracts were signed, HC3 got to work with Alliance's core provider. HC3 understood that while statements are important, they aren't as important as core integration. HC3's Project Manager was crucial in the integration processes ensuring that milestones were being met to allow a smooth transition. The Project Manager worked as a member of Alliance's team to support its staff with limited resources.

"Working with Alaina was amazing," said Stephen Summers, SVP of Information Systems at Alliance Bank & Trust. "She was extremely patient with me while also ensuring that things were pushed along. She worked quickly with the HC3 team to address my concerns and communicated a realistic integration timeline which immediately set our team up for success."

Alliance Bank was also able to upgrade its digital statement design to better fit with a digital-first mindset by utilizing one of HC3's statement templates.

Results

Now Alliance Bank's digital statements are integrated seamlessly with their Q2 digital banking platform. This allows for a consistent and cohesive experience for their customers. The new statements are designed to reinforce brand identity and communicate key financial data in a clear and easy-to-digest way.

The HC3 team continues to work closely with Alliance addressing issues promptly.

"The support process has been great," said Summers. "Whenever an issue arises we simply put in a support ticket and HC3 fixes it quickly. I appreciate the effort HC3 puts into working efficiently to get things working seamlessly for our customers. They have been very pleased."