

FinServ

\$7B

In assets

55

Branches

700

Employees



FDIC FDIC-Insured - Backed by the full faith and credit of the U.S. Government

Lake City Bank is a relationship-focused community bank headquartered in Indiana, serving Central and Northern Indiana through 55 branches and digital channels. The bank sought to modernize its fragmented CRM landscape to support disciplined growth, stronger data governance, and scalable AI adoption across commercial, retail, and wealth operations.

Use cases

Unified Enterprise CRM Platform: Consolidated multiple legacy systems into one structured environment supporting commercial, retail, private banking, wealth, treasury, call center, and back-office teams.

Standardized Sales & Relationship Processes: Embedded CRM and process governance across banking operations to improve execution consistency and visibility.

AI-Enabled Banker Workflows: Native AI capabilities supporting predictive insights, intelligent forecasting, and next-best-action recommendations — designed to augment, not replace, banker expertise.

Unified Marketing Platform: Centralized campaign management to drive coordinated, data-informed customer engagement.

Scalable No-Code Architecture: Flexible configuration and rapid process adjustments without heavy technical overhead.

Business outcomes

- No-code architecture enabling long-term adaptability
- AI-native design aligned with responsible adoption strategy
- Strong business process management capabilities
- Enterprise scalability across 700+ employee
- Demonstrated partnership and customer-first approach