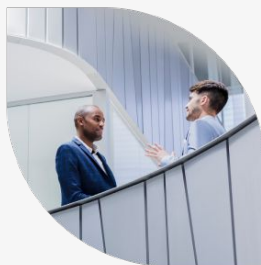


EBOOK

Banking Success Stories

How financial institutions centralize information, strengthen compliance, and set frontline staff up for success





— The backbone of your financial institution

Banks and credit unions operate in a high-stakes environment — where compliance is non-negotiable and staff need instant access to accurate information to deliver exceptional service.

These challenges underscore the importance of having a modern, interactive, and intuitive intranet platform.

A well-designed intranet can help improve processes, speed up decision-making, and foster a sense of community across branches and offices, forming the cultural and informational backbone of your organization.

In this eBook, we'll highlight key intranet use cases and features for banks and credit unions. Then, we'll walk through some success stories showcasing how financial institutions are using their intranet to achieve their goals and drive real results.



Intranet use cases and features for financial institutions

We've worked with many financial institutions across North America, and these are some common ways that organizations leverage their intranet along with some platform features designed specifically with banks and credit unions in mind.

Streamline information sharing across branches

With staff spread across branches and offices, banks and credit unions need a reliable platform to serve as a central source of truth for information sharing.

When interest rates change or promotions are updated, time is of the essence. A well-designed intranet makes it easy for your team to quickly update content on products, policies, and processes and share it out to staff instantly, helping you maintain business consistency.

Enhance customer service

Customer-facing employees depend on up-to-date resources, like financial calculators and how-to guides, to provide customers with top-tier customer service.

An intuitive, well-organized intranet helps your staff identify exactly where to go to access the latest information and help they need.

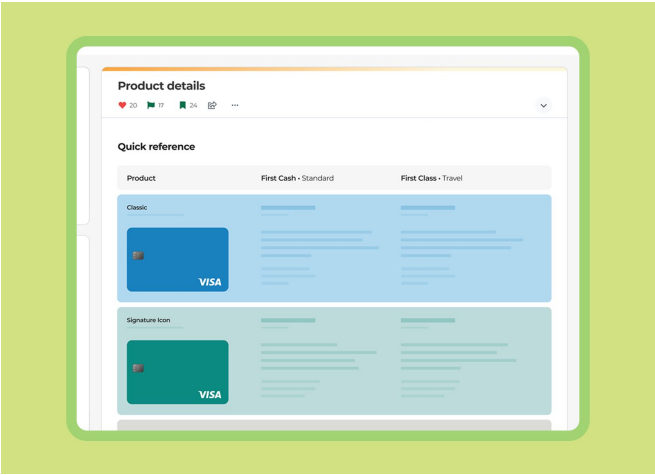
Consolidate compliance information

Banks must comply with strict regulations around data protection, financial reporting, and anti-money laundering laws. Having compliance information accessible and at-the-ready is non-negotiable.

Centralizing compliance resources, training materials, and audit tools in one place helps organizations maintain regulatory adherence, reducing risk and keeping accountability across all departments and branches.

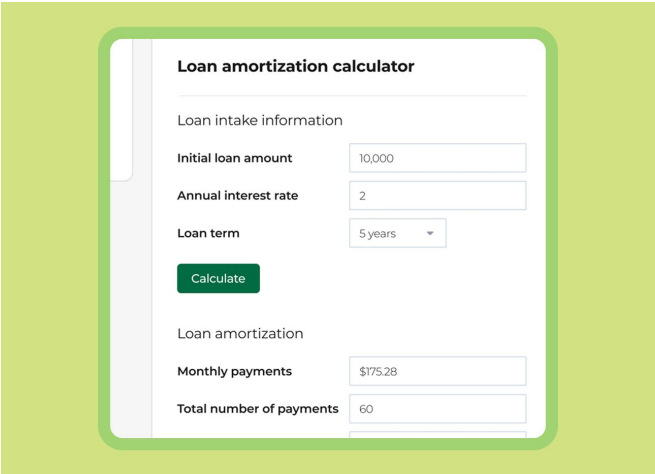


Banking intranet features



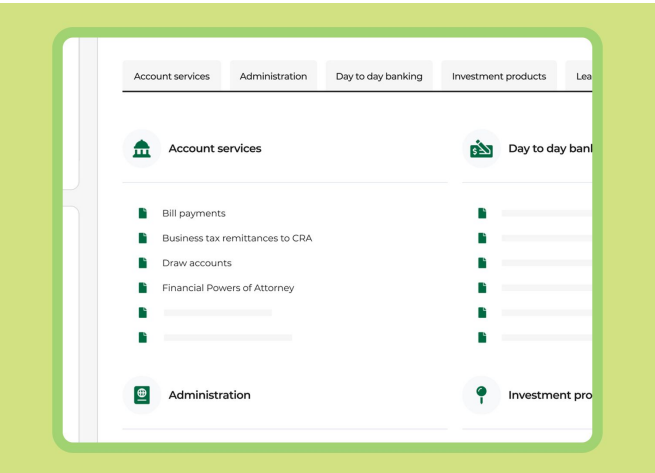
Product fast facts

Easily compare and share product details. Compare annual fees, rates, and features with our pre-built financial product comparison templates.



Loan calculator

Make it easy for front line teams to share loan amortization scenarios with easy payment calculations, schedules, and principal and interest breakdowns.

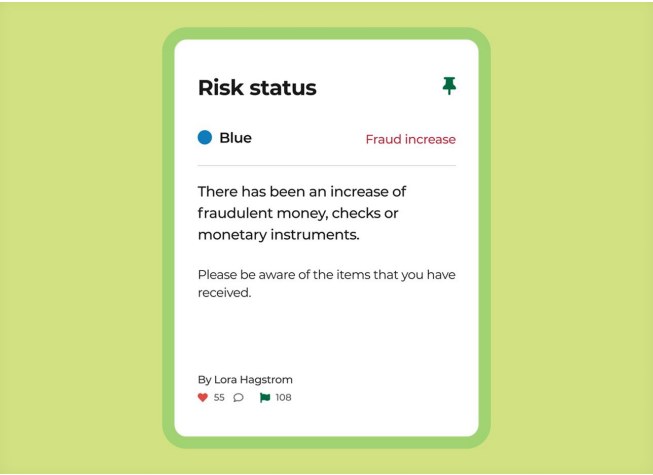


Quick links

Accelerate response times by giving your front line employees quick access to frequent questions.

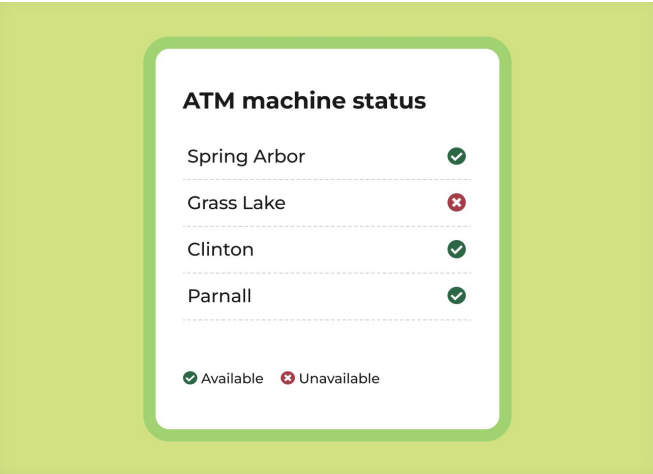


Banking intranet features



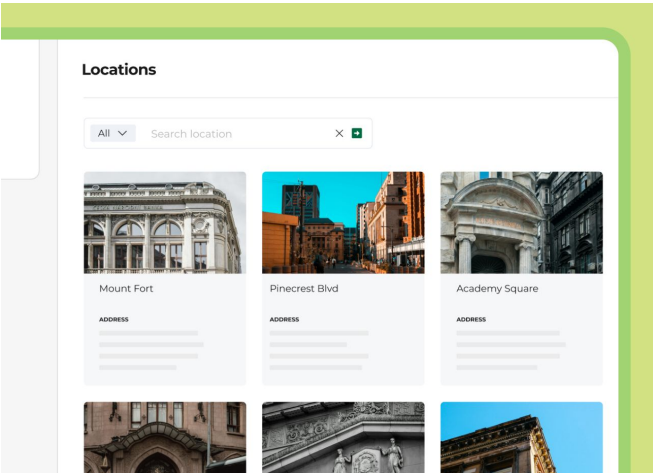
Fraud alerts

Highlight fraud concerns and share precautions that can be updated at the head office and branch levels.



Machine status indicator

Keep track if one of your ATM machines is offline. Set up a machine status indicator so your team can check statuses at a glance.



Branch locator

Equip customer-facing teams and phone support with detailed information for all branch locations.



Bonvenu used ThoughtFarmer to create The Vault, overcoming search frustration and building engagement while completing a brand overhaul.

Industry
Financial Services

Employees
215



Challenge

Unreliable search that often failed to surface everyday forms and documents.

A slow, unintuitive existing platform that required specialized training and coding knowledge to maintain.

A major rebrand that exposed the limitations of the current intranet and demanded a more capable platform to support the transition.

No built-in engagement features, leaving staff across 14 branches with few ways to connect.

Solution

Powerful, reliable search that helps staff find what they need on the first search.

An easy-to-use, no-code-required interface that reduced a three-hour theming task to just three minutes.

Built-in engagement tools, including polls, shout-outs, likes, comments, and rich employee profiles that strengthen culture and connection.

Exceptional, consistent support from ThoughtFarmer's Customer Success team with timely responses and personalized video walkthroughs.

Results

100% adoption with nearly 3,500 likes and comments, 3,400 pieces of content created, and 2,000 peer shout-outs in the first year alone.

Nearly 14,000 searches in year one, significantly reducing "where's the document?" calls and emails

Approximately 17,500 document downloads in the first year, reinforcing The Vault's role as the go-to source of truth.

Estimated 15 minutes saved per employee per week totaling 2800+ hours over a year, delivering meaningful ROI across 215 staff.

“

“The customer service offered through ThoughtFarmer is like nothing I've ever experienced. We were walked through every step with well-designed training classes and never left to just figure it out on our own.”

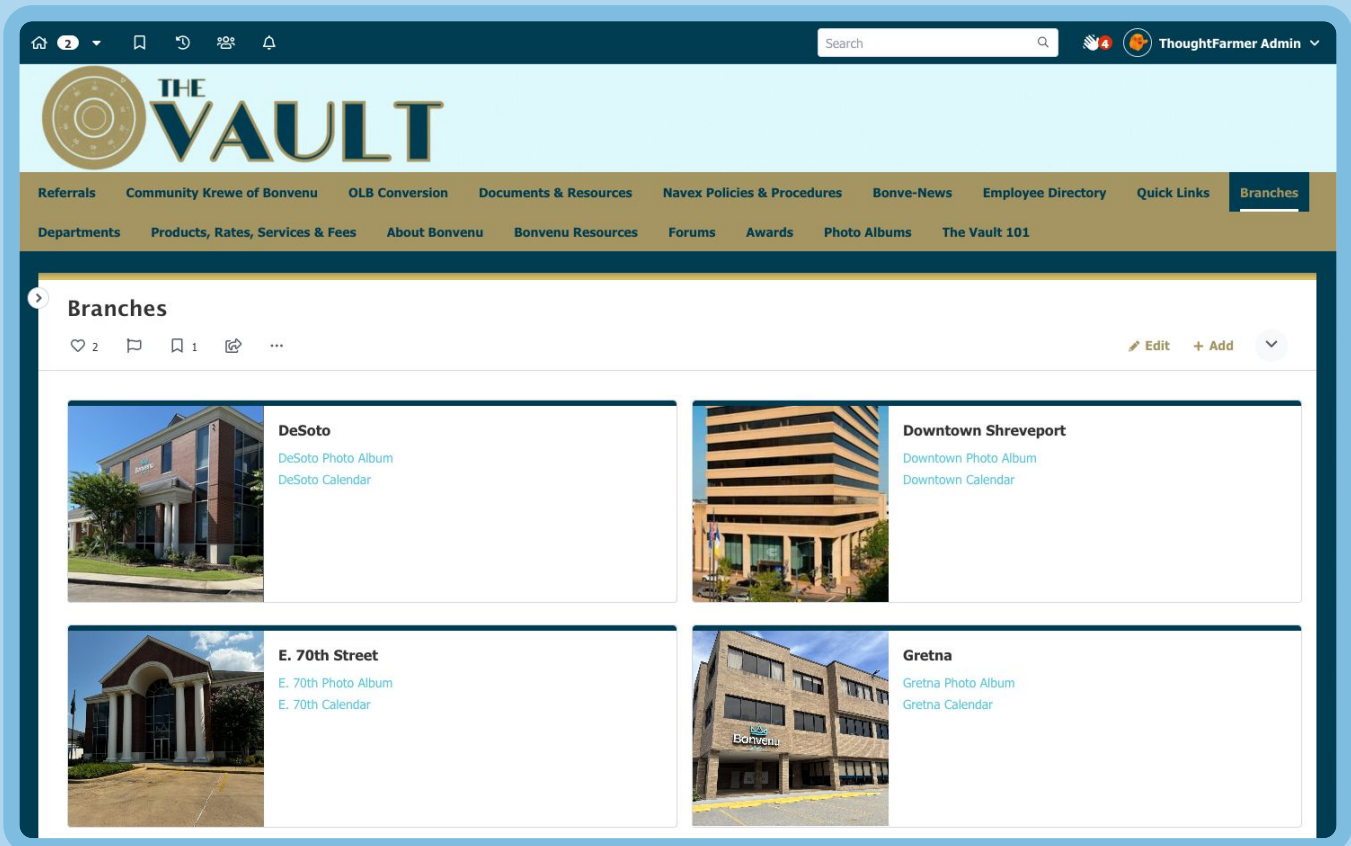
Julie Ashbaugh
VP & Corporate Training Officer, Bonvenu Bank



Bonvenu used ThoughtFarmer to create The Vault, overcoming search frustration and building engagement while completing a brand overhaul.

Industry
Financial Services

Employees
215





How Coast Central Credit Union improved internal communications and employee engagement with their transformed intranet, Coastnet.

Industry
Financial Services

Employees
300

[Read full story](#)



Challenge

Internal communication challenges due to not having a centralized platform for disseminating information or managing documentation.

Multiplying inefficiencies with coordinating across teams or branches.

A disengaged workforce from a lack of culture-building opportunities.

Solution

Simple content creation and customization with creative themes.

Streamlined forms that enable automation.

The ThoughtFarmer customer support team who deliver quick and knowledgeable support and responses to issues.

Result

Centralized information sharing. Coastnet became the go-to source of information for all employee information and news, keeping everyone in the loop.

Improved community and connection. Employees across branches can easily see company celebrations, announcements, and CEO updates, and access the community hub, Coast Central Perk.

Streamlined processes by doing away with paper forms, making it easy to manage business cards, vacation requests, and more.

“

I love the ease with which we can just create a page on the fly really quickly and change things up. I like the layout, and how easy it is to use.”

Kandis Basinger
Training Manager at Coast Central Credit Union

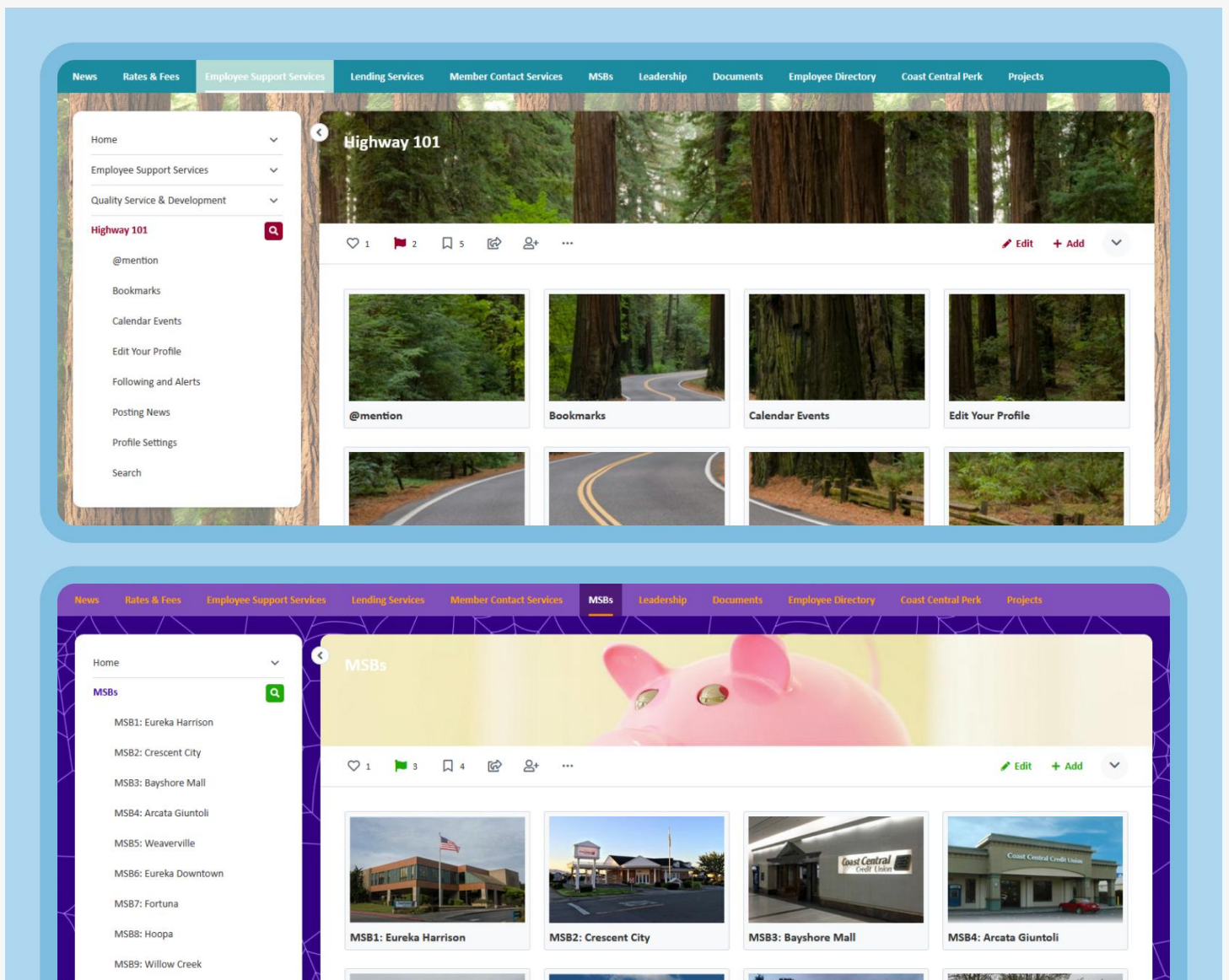


How Coast Central Credit Union improved internal communications and employee engagement with their transformed intranet, Coastnet.

Industry
Financial Services

Employees
300

Read full story

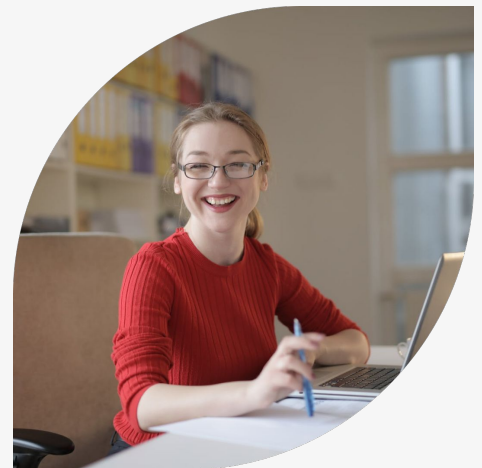




Florida Capital Bank transitioned from SharePoint to a ThoughtFarmer intranet and united teams across divisions.

Industry
Financial Services

Employees
126



Challenge

Structural silos hindered collaboration between mortgage and bank divisions.

Communication breakdowns increased as remote work expanded, causing lost emails and difficulty finding policies and forms.

The previous outdated intranet, SharePoint, required weeks of IT support for simple updates, creating inefficiencies.

SharePoint's folder-based structure buried content, leading to inconsistency and disconnect.

Solution

A free intranet trial site let the team experience ThoughtFarmer's ease of use first hand before deciding.

Fast implementation, supported by ThoughtFarmer's Professional Services team, helped Florida Capital Bank's small launch team go live with The HUB on time in just 8–10 weeks.

Easy-to-update, no code intranet platform empowered Marketing to make quick changes without IT involvement.

Results

Saved staff time searching for key information with a reliable single source of truth.

Improved internal communications by reducing emails.

Streamlined processes with online forms and better tracking.

Reduced marketing requests by enabling staff to self-serve brand assets.

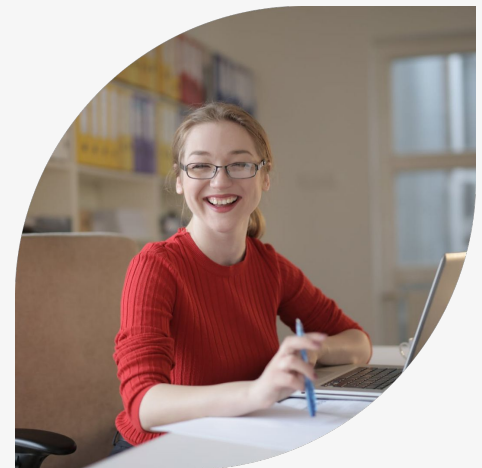
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"The HUB has helped us work as one company. Our mortgage and bank teams now understand what each other are doing, and it's made a huge difference in alignment and connection."

Anita Speck
Managing Director of Marketing, Florida Capital Bank



Industry	Employees
Financial Services	126





JD Bank introduced a modern ThoughtFarmer intranet to elevate company culture and improve customer service.

Industry
Financial Services

Employees
240

[Read full story](#)



Challenge

JD Bank's previous Joomla-based intranet was difficult to support and not user-friendly.

The outdated intranet made it complicated to quickly locate and update crucial information.

Limited features prevented easy access to departmental information, forms, procedures, links, resources, and current news.

Solution

Powerful search functionality, making it easy for employees to find the resources they need.

A simple-to-update content interface, empowering employees across the organization to own and manage content.

An easy-to-use online form builder (FormFlow), automating key business processes like community investment service, expense reports, and logo apparel.

Results

Improved employee job performance and client services with a centralized, easy-to-navigate information source.

Celebrated JD Bank's culture with the ability to share photos, company events, and employee news.

Automated business processes with form workflows through FormFlow, an easy to use online form builder, doing away with pesky PDFs.

“

Our [ThoughtFarmer intranet] homepage gives us access to all the news and information that is relevant to us, at a glance. It also serves as a launch pad to critical business systems, and gives us one-click access to all our internal forms,”

David Wallace
Network Administrator for JD Bank

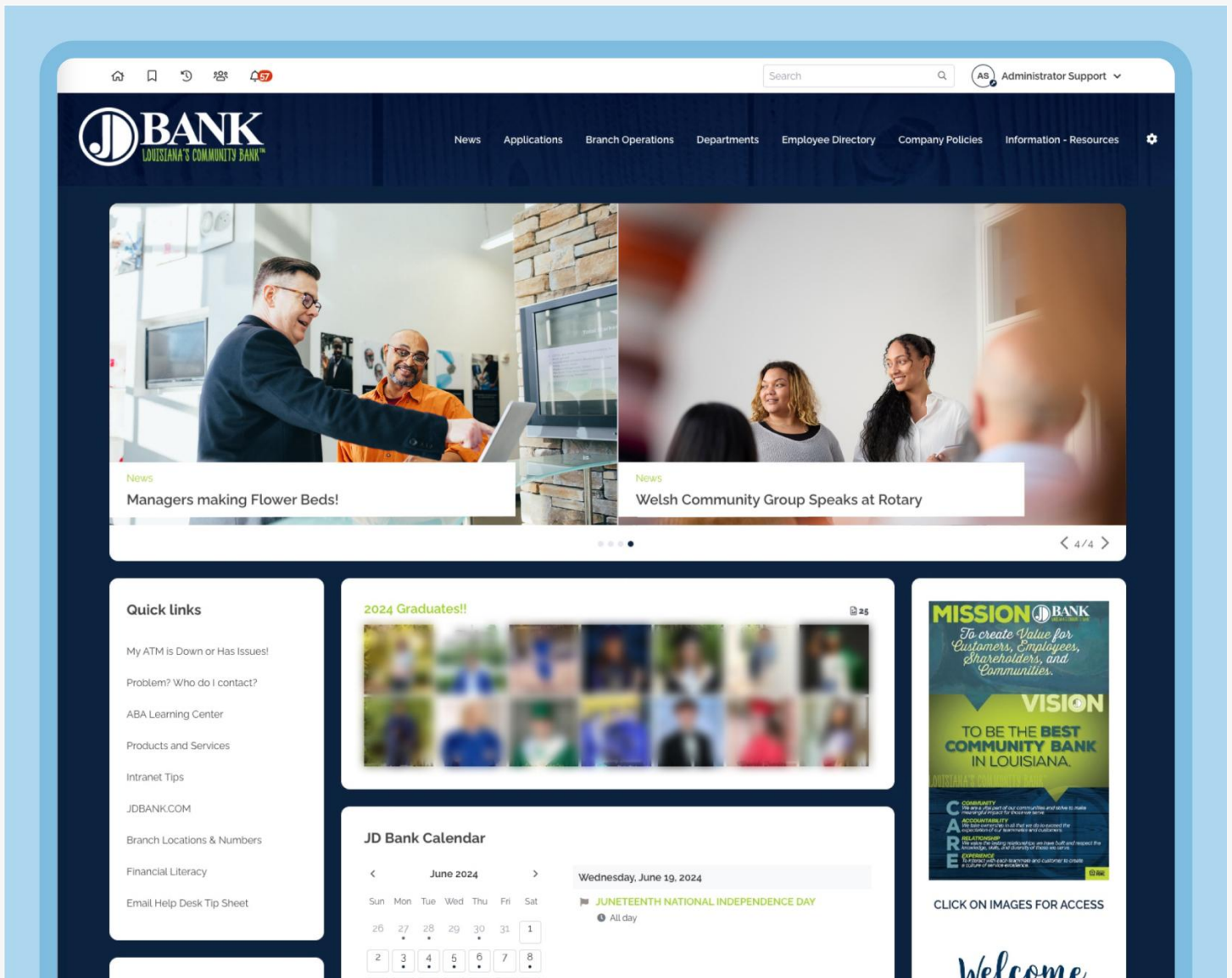


JD Bank introduced a modern ThoughtFarmer intranet to elevate company culture and improve customer service.

Industry
Financial Services

Employees
240

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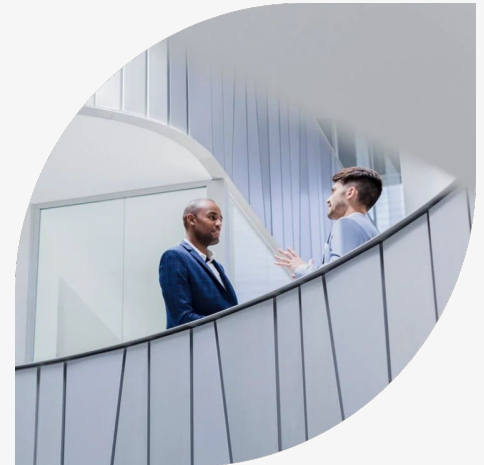


How DUCA moved from SharePoint to ThoughtFarmer, breathing new life into their communication and culture.

Industry
Financial Services

Employees
400

[Read full story](#)



Challenge

SharePoint's siloed and complex upload processes were time consuming and resource intensive.

The communication team was bogged down with department requests, slowing productivity and increasing inefficiency.

Limited opportunity for interaction hindered the creation of a connected culture.

Solution

A clean and organized interface made it easy for employees to navigate and search.

Easy content creation and management reduced their dependency on the communications team and sped up the delivery of time sensitive information.

Interactive capabilities enabled employees to like, comment, and interact with posts, leading to a more engaged and collaborative environment.

Supportive implementation and onboarding, with a customized set up, comprehensive training sessions, and ongoing support.

Result

Improved efficiency with employees now able to manage content on their own and find the information they need almost instantly.

Enhanced company culture, helping DUCA build a more connected and inclusive workplace environment.

Empowered employees, giving the team a sense of ownership over their contributions.

Better communication with transparent, real-time notifications to ensure no one misses critical information.

“

The improvements we've seen with ThoughtFarmer are remarkable. Our employees are more engaged, our communication is more effective, and the overall efficiency of our operations is so much better.”

Katrina Ferro-Longo

Manager of Employee Communications and Events at DUCA

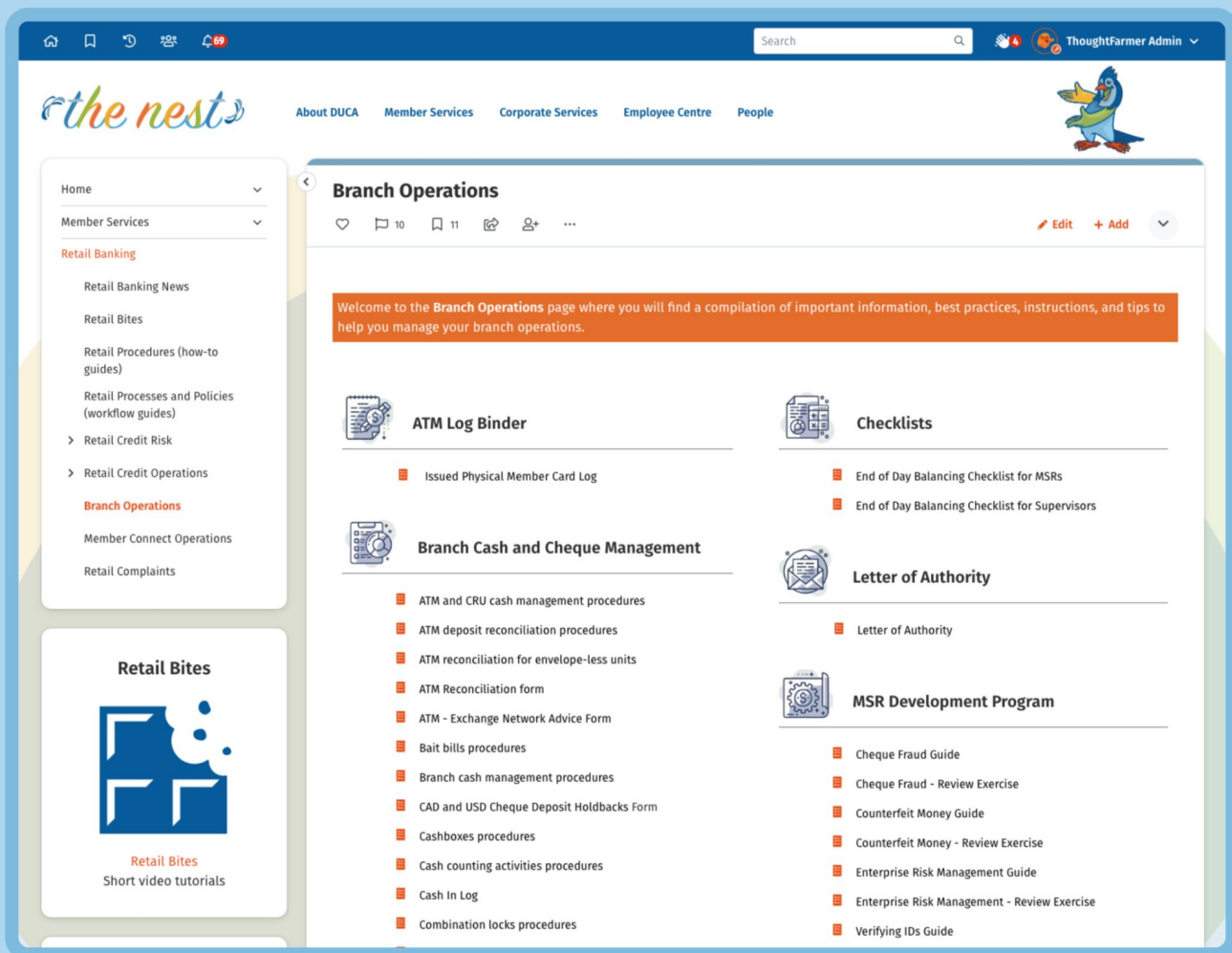
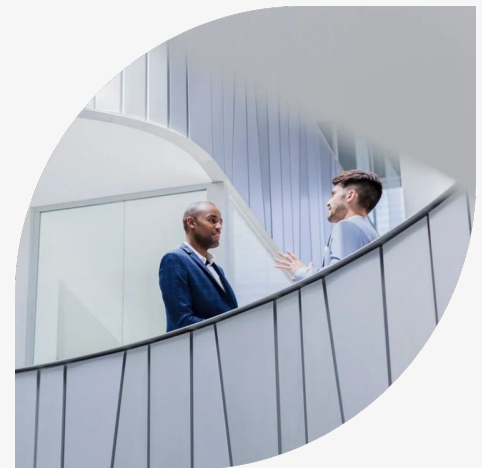


How DUCA moved from SharePoint to ThoughtFarmer, breathing new life into their communication and culture.

Industry
Financial Services

Employees
400

Read full story





Farm Bureau Bank (FBB) used ThoughtFarmer to build their organizational culture and unite the company as a team.

Industry
Financial Services

Employees
200

[Read full story](#)



Challenge

The previous intranet forced a top-down approach with all updates running through IT.

Limited social features prevented the entire FBB team from getting involved, engaged, and excited.

Solution

A customizable look and feel that ensured the intranet matched FBB's brand and public-facing website.

Easily accessible pages to host department information, company KPIs, news, project updates, policies, and more.

Integrations with other tools, like FBB's document management system.

Interactive polls that made it simple for their organizing committee to get employees involved and gather feedback.

Results

Huge cost savings with hundreds of person hours saved in the first year alone.

Improved information distribution and reduced reliance on email by giving teams access to information on demand.

Increased employee engagement and reinforced the roots of their corporate culture by keeping employees better connected and informed.

“

The support we get from ThoughtFarmer is phenomenal. Response times on help requests are great. We just wish all our vendors were that way.”

Richard Hamlin
CIO at Farm Bureau Bank



How Cambrian Credit Union achieved a 96% intranet adoption rate with a well-designed and organized intranet from ThoughtFarmer.

Industry
Financial Services

Employees
400



Challenge

Cambrian's previous in-house intranet was outdated, serving as a limited basic document repository and staff directory with no interactive features, resulting in low engagement.

The ever-evolving finance industry made it challenging to ensure staff were up to date on important changes.

Important information was getting lost in staff inboxes because of overreliance on email for sending memos and forms.

Solution

True to its namesake, Cambrian's new intranet, MILO (Mountains of Information Logically Organized), helped bring order and visibility to company communications.

ThoughtFarmer's intuitive design system made it easy to update logos and custom graphics, keeping content fresh throughout the seasons.

Easy content management and a robust search functionality helped the team update and find information easily.

The Engagewear integration add-on kept multiple systems connected within one intranet platform, making it quicker for staff to search for what they need.

Result

Cambrian experienced a **96% adoption rate** and **improved per employee engagement by 22%** within two years of launching their new ThoughtFarmer intranet.

Improved communication by building an engaging intranet homepage that displays the most relevant information first.

Implemented a dedicated 'Cambrian in the Community' page showcasing up-to-date, interactive community-based content.

Increased searches by 40%, empowering employees to find and access the information they need when they need it.



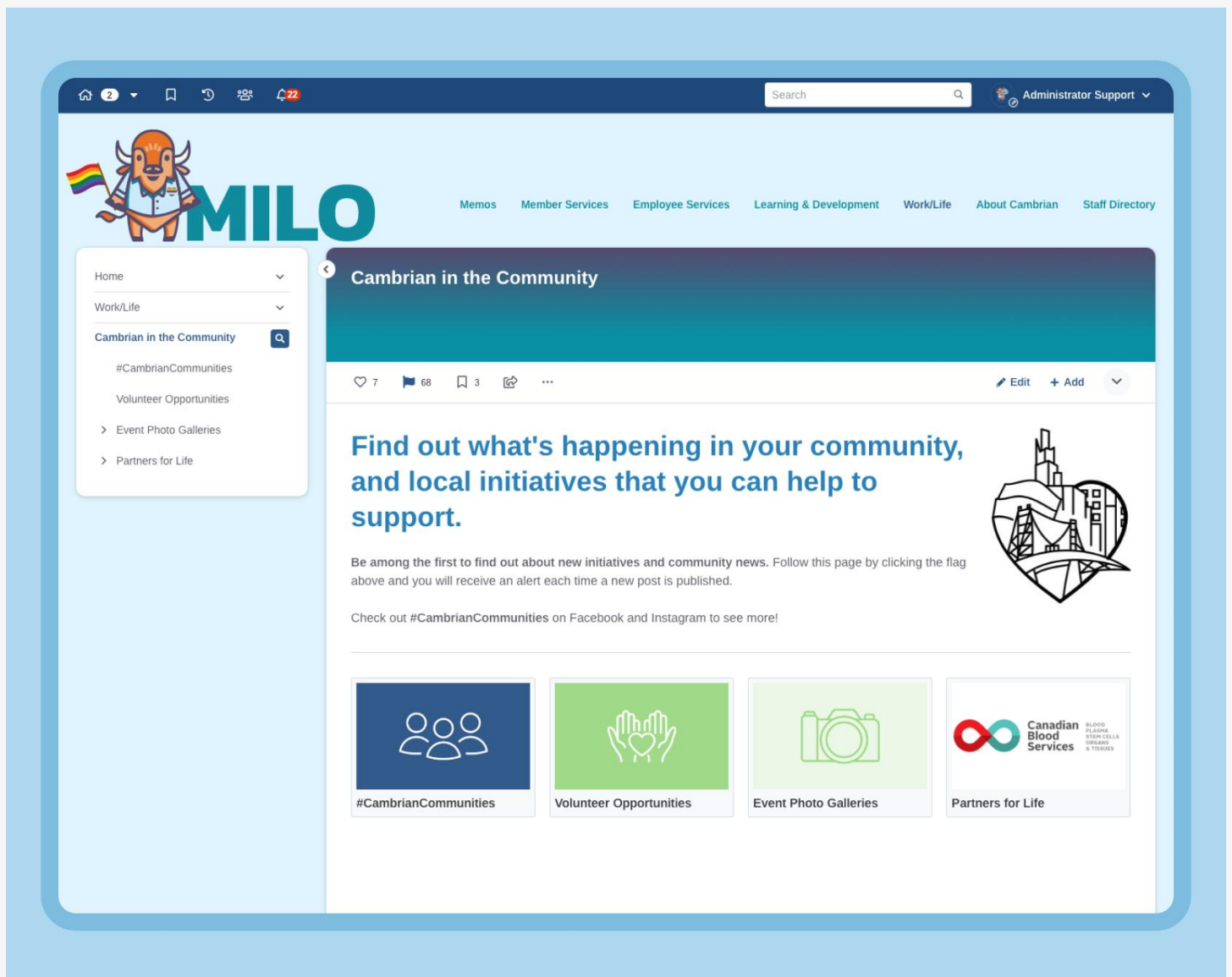
Cambrian partnered with ThoughtFarmer to bring their vision for an interactive, organized, and eye-catching intranet to life. Their new intranet, MILO's name, which stands for Mountains of Information Logically Organized, is a perfect description of both the challenge the team was facing and their approach to fixing it."



How Cambrian Credit Union achieved a 96% intranet adoption rate with a well-designed and organized intranet from ThoughtFarmer.

Industry
Financial Services

Employees
400





Why choose ThoughtFarmer for your intranet

ThoughtFarmer has become the best-in-class partner for financial institutions—backed by almost 20 years of experience helping banks build intranets that connect staff and unify information sharing across branches.

Here's how ThoughtFarmer can help you transform your intranet into high-yield wins:

- **Boost frontline efficiency** by making it easy for employees to find the right information at the right time.
- **Create a single source of truth** with a centralized, accessible repository for essential resources.
- **Streamline communication** across departments, branches, and offices to keep everyone aligned.
- **Ensure compliance** by housing all regulatory, security, and policy information in one location.
- **Encourage cultural connection** by uniting employees across branches and highlighting what makes your workplace unique.
- **Simplify document management** with tools that organize and maintain your documentation with ease.

With ThoughtFarmer, you're getting more than just an intranet – you're benefiting from a trusted partner that's committed to supporting your team's success.

See ThoughtFarmer in action

[Book a demo](#)

Learn more about

[ThoughtFarmer Solutions for Banks](#)

[ThoughtFarmer Solutions for Credit Unions](#)

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Where Teams + Ideas Grow 