

## Case Study



### Community First Bank

#### Director® Enterprise Content Management and So Much More

What started as a search for a tool to image loan documents turned into the rollout of Director from Fiserv, an all-encompassing, enterprisewide solution that touches every aspect of the business. Adding Director Unity Client to the mix has made complex processes even easier.



For Community First Bank CFO Greg Burck, it all started with his position on a Fiserv client advisory council and the product demonstrations he would see at various meetings.

"I had seen glimmers of what Director could do," Burck said. "I was always intrigued by it, but I wasn't thinking it would take us where we've ended up. I would see something at a meeting and think, 'Director can do that? Director can do that too?'"

Those revelations led to a realization that Director was so much more than a computer output to laser disk (COLD) system, which is typically limited to electronic data archival. In fact, Community First Bank uses Director throughout the entire organization—in all areas, by every employee, every day.

#### **The Director Unity Client Difference**

With Director firmly embedded into the bank's operations and the organization's proficient use of the solution, the pieces were in place for the next phase of the experience. Director Unity Client provides users with an easily navigable and refreshed interface, allowing them to perform tasks with little or no training. Community First Bank is a strong proponent.



**Community**  
FIRST BANK

#### **Client Profile**

Community First Bank was organized in 1997 to provide the personalized service and attention that is the hallmark of community banking. Consolidation in the banking industry created a need for a locally owned and operated community bank that could respond to customer needs by creating relationships important to both businesses and consumers.

Through four locations in the state of Washington, Community First Bank serves the financial needs of its customers and communities where they live and work.

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"It's Director, but with an entirely different interface that's very intuitive," Burck said. "People are instantly familiar with it, because it looks much like Microsoft® Office. From a new employee perspective, it trains itself. People know what they're supposed to do in five minutes.

"Unity has also allowed us to push Director out to examiners, auditors and CPAs. They're able to find what they need quickly and without any assistance."

For Burck, a big selling point for Director Unity Client is the forms. Unity forms are in an HTML format the bank can build into Director, then put into their workflows.

"Unity forms eliminates the need to go into Microsoft Word, enter the information, print it, have a client sign it, scan it and then index it," Burck said. "Unity forms take all those steps and turn them into a simple 'Complete and submit the form.' This eliminates the paper and allows us to publish forms on our network."

### Unity Across the Enterprise

Community First Bank uses Unity forms in all areas of the bank, even human resources. The bank's management emphasizes regular interaction between supervisors and employees and instituted employee development meetings to formalize that process. A Unity form was created, and now when the time comes for the employee and supervisor to meet, an email generated through Directory Unity Client serves as a reminder and includes notes from the previous meeting.

As Burck observes, "The beauty of Director is that once you build it out, it pretty much auto-functions. You don't have to touch it—it just works."

### Opportunity

Community First Bank was looking for a solution to image loan documents, and the bank soon realized there was a much bigger opportunity available with Director from Fiserv.

### Solution

With Director, the bank's leaders discovered a complete enterprise content management system that transformed business processes across the bank. And by implementing Director Unity Client, the user experience was greatly enhanced, further simplifying complex processes.

### Proof Points

Since implementing Director, the bank has:

- Resolved existing control weaknesses by virtually eliminating paper
- Simplified bank examinations and audits due to the ease of use of Director
- Reduced training times for employees through the use of Unity forms
- Streamlined teller balancing with Unity forms
- Automated business processes across departments, including human resources

### Connect With Us

For more information about Director, call 800-872-7882, email [getsolutions@fiserv.com](mailto:getsolutions@fiserv.com) or visit [www.fiserv.com](http://www.fiserv.com).



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