



CASE STUDY

jhaEnterprise Workflow™

“We rely on jhaEnterprise Workflow™ tracking to show who made changes, who reviewed changes – it’s critical to our daily processes.”

Amy Vogel
Vice President and Chief Risk Officer
Isabella Bank Corporation

Institution:
Isabella Bank Corporation

Location:
Mt. Pleasant, Michigan

Website:
www.isabellabank.com

Assets:
\$1.7 billion

Founded:
1903

Isabella Bank Corporation Streamlines its Operations with jhaEnterprise Workflow™

For 112 years, Isabella Bank Corporation has served Michigan communities with an emphasis on community-based service and values. As the institution grows, and as financial technology becomes more complex, it needs to continually upgrade its operational efficiency to maintain the high level of service that its account holders are accustomed to.

That means making use of automation, document management, and workflow optimization. Isabella Bank Corporation uses jhaEnterprise Workflow for streamlining work processes. We spoke with Amy Vogel, Vice President and Chief Risk Officer at Isabella, to get details on its successful use of this product.



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JHB: Before you began using workflow optimization software, was there a specific problem or need that made you want to acquire it?

Amy: It was the tracking capability that was the first thing that caught our eye. We thought the consistent audit trail would give us proof-of-process as outlined in written procedures.

JHB: What gains in efficiency have you seen since beginning to use workflow enhancement?

Amy: Prior to the enhancement, we spent a week preparing for an audit; finding when forms were signed and dated, and so on. With workflow, it's tracked for us. We don't have to pull paper documents, we pull the electronic document and attached audit trail. We can see who touched which document and when. That's the first efficiency we realized with Synergy Workflow Management™, which has carried over into the jhaEnterprise Workflow system as well.

JHB: How much time does this save for you?

Amy: The time saved on audit trails alone is probably four hours per week, averaged over a year.

JHB: Where else have you seen efficiency gains?

Amy: Workflow keeps processes moving along quickly and efficiently while always in the right order according to our procedures. Workflow's ability to upload directly to the core supports efficiency improvements even further so we can focus our efforts and time on other projects that help move our company forward.

JHB: Which of your business units are benefiting from the use of jhaEnterprise Workflow?

Amy: Shareholder Relations, Financial Services, Loans, Deposits, Human Resources, Collections, IT, Card Services ... we see this as a company-wide solution. jhaEnterprise Workflow is also used for training. We are currently working on a workflow form that will add efficiencies to teller operations.

JHB: How does your HR department make use of this product, and how is it used for training?

Amy: One way HR uses it is for staff turnover. For example, if a person is retiring, there is an automatic process now for updating accounts and changing codes. It prevents documents from being lost or set aside. For training, workflows help maintain consistency and minimize training time. A workflow alone can walk a new employee right through the steps of a process.

JHB: How would you rate jhaEnterprise Workflow in terms of importance to your organization?

Amy: It has become a critical system. Our operational areas are heavy users. No less than 500 – 550 flows go through our system on a daily basis. We rely on its tracking to show who made changes, who reviewed changes – it's critical to our daily processes.

JHB: What are some features that you find particularly useful?

Amy: The email notification feature alerts you if something is in a queue to be worked on. It helps senior managers who aren't regularly in the system stay on top of their ongoing tasks. Core integration is extremely helpful even with things as simple as changing a phone number. A staff member can enter something in jhaEnterprise Workflow, which is then updated to the core. We don't need to give an employee access to the core, which is a huge benefit. We also appreciate that this is not a static system – we can incorporate new workflows or change existing ones.

JHB: What would you tell another bank that asked you about the merits of jhaEnterprise Workflow?

Amy: We receive consistency and improved training! Those are benefits that apply to everyone. We use jhaEnterprise Workflow all day every day.



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jhaEnterprise Workflow™. By automating multi-step business processes, the need for time-consuming manual tasks and redundant data entry is eliminated – providing banks with a streamlined, cost-effective way to reduce operational risk and expense.



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