

CASE STUDY

Peoples Security Bank & Trust Improves Customer-Facing Processes with *jhaEnterprise Workflow*™



jack henry Banking®

“The ability to control your process – and getting those processes so they’re consistent every single time – that’s huge.”

- PENNY CAMACHO, WORKFLOW BUSINESS ANALYST, PEOPLES SECURITY BANK & TRUST

“We’re currently saving 350 hours per month bank-wide, across 81 workflows,” says Penny Camacho, Workflow Business Analyst at Peoples Security Bank & Trust. “In addition to our 81 live workflows, we have 25 in design and 47 pending requests from different departments. Everyone wants a workflow: the call center, debit cards, online banking, IT, help desk support, loan servicing, loan scanning, credit administration - the list keeps going.”

Peoples Security Bank & Trust is a Pennsylvania-based community bank dedicated to becoming the premier financial services company in Eastern Pennsylvania as measured by quality, earnings, and growth. As they look to the future, the bank strives to exceed its customers’ expectations while helping them achieve their financial goals, create a work environment where its employees can develop professionally, and help make its communities better places to live and work.

By implementing workflows with *jhaEnterprise Workflow*, Peoples Security Bank & Trust has been able to deliver on an improved work environment for its employees and, in turn, enhance customer-facing processes. “Our first time-saving initiative utilizing *jhaEnterprise Workflow* was better management of our returned mail process,” recalls Camacho. “With the large volume of communications the bank mails on a regular basis, our returned mail volume can become overwhelming if not properly managed. We created the returned mail workflow a year ago, and in doing so, we were able to streamline our communications and make our process more efficient.” Camacho continues, “Having the ability to scan returned mail into a workflow enables us to coordinate the work between multiple departments more quickly. *jhaEnterprise Workflow* has been a huge benefit.”

***jha*ENTERPRISE WORKFLOW**

*jha*Enterprise Workflow simplifies business processes by fully automating, streamlining, and standardizing any procedures that involve multiple steps, individuals, groups, departments, and systems. It supports virtually any process that is performed with a series of consistent steps; automatically routing assignments based on established credentials, permission levels, and availability, and strictly enforcing established approval processes.

“One of the most beneficial features of this program is the workflow instance search. With returned mail, for example, if there is already one workflow established for a customer, then there is only one process per customer regardless of the number of pieces returned.” Camacho continues, “Once we saw how successful this first implementation was, we were able to apply this program to multiple other tasks throughout the bank. This program has given us the opportunity to simplify our workload and to improve the flow of communications between different branches and departments within the bank. It’s been a very valuable resource.”

By applying workflow automation thinking to multi-step business processes, the need for time-consuming manual tasks and redundant data entry is eliminated. The result? You now have a streamlined, cost-effective way to reduce operational risk and expense.



“*jha*Enterprise Workflow has been a huge benefit for this team.”

- PENNY CAMACHO, WORKFLOW BUSINESS ANALYST,
PEOPLES SECURITY BANK & TRUST



“Utilizing workflow automation helps provide consistent data entries.” Camacho adds, “With *jha*Enterprise Workflow, we are able to take difficult and time-consuming projects and simplify our processes.”

“The ability to control your processes - and getting those processes so they’re consistent every single time - that’s huge.”

“*jha*Enterprise Workflow has allowed us to better serve our customers,” finishes Camacho.



“We’re currently saving 350 hours per month bank-wide, across 81 workflows.”

- PENNY CAMACHO, WORKFLOW BUSINESS ANALYST,
PEOPLES SECURITY BANK & TRUST

INSTITUTION

Peoples Security Bank & Trust

LOCATION

Scranton, PA

WEBSITE

psbt.com

ASSETS

\$2.8 billion

BRANCHES

26

FOUNDED

1905

***jha*ENTERPRISE WORKFLOW**

Workflow automation greatly improves internal communication within your bank, helping to streamline and simplify processes that, if handled incorrectly,

could cause serious risk. The *jha*Enterprise Workflow solution facilitates timers and notifications of workflows and tasks. You can be sure that you are meeting and exceeding your bank service-level agreements (SLA), and providing your members with an experience that exceeds their expectations.

By automating workflows, you effectively assign a workflow author who is responsible for every part of the process. For each step in the process, there

is one person designated to perform a specific action. By doing this you are creating a system of accountability, where everyone knows what specific tasks they are responsible for. This also reveals which tasks take the most time to complete and where the process seems to get held up the most frequently.

By implementing workflow automation, everyone at your bank knows who is responsible for each task, and everyone is clear on their tasks and deadlines. Workflow automation also enables you to make better future decisions to create more effective processes and assign work accordingly. The most effective way to implement a new workflow is to include the stakeholders who are involved in that process during the design phase. This ensures that all touchpoints are addressed.



Penny Camacho
Workflow Business Analyst
Peoples Security Bank & Trust



*"jha*Enterprise Workflow has allowed us to better serve our customers."

**- PENNY CAMACHO, WORKFLOW BUSINESS ANALYST,
PEOPLES SECURITY BANK & TRUST**

For more information about Jack Henry Banking®, call **417-235-6652** or email **askus@jackhenry.com**.