



## CROSSFIRST BANK A DIGITAL WORKSPACE TO IMPROVE ONBOARDING AND TRAINING



### Project Goals

In March 2018, the Strategic Applications team at CrossFirst Bank set out to replace the company intranet portal.

The goals when developing the new intranet were to improve upon and centralize:

- Training and communication
- Change management
- Business and process documentation
- Employee Collaboration

### The Solution

Due to a 400% increase in company size between 2013 and 2018, a point of emphasis when designing the tool was to focus on improving onboarding features and new employee training. After deliberating with the intranet experts at RSM and looking at the many digital workplace options available, CrossFirst Bank decided to implement a Powell Intranet. The templated, easily deployable – yet visually appealing - Powell Intranet portal immediately attracted CrossFirst Bank, along with its cost-effective pricing. CrossFirst Bank loved the ability to customize the portal in line with the company branding and the ease of navigation and positive user experience eventually convinced them to transform their digital workplace with a Powell Intranet.

“We wanted to make sure we were providing relevant content in a place where employees could access and use the tools that they needed. Increasing employee efficiency and reducing the number of unnecessary clicks our teams must do in day to day tasks were also things we had hoped to improve upon.”

*Theresa Thomas, Business Analyst, CrossFirst Bank*

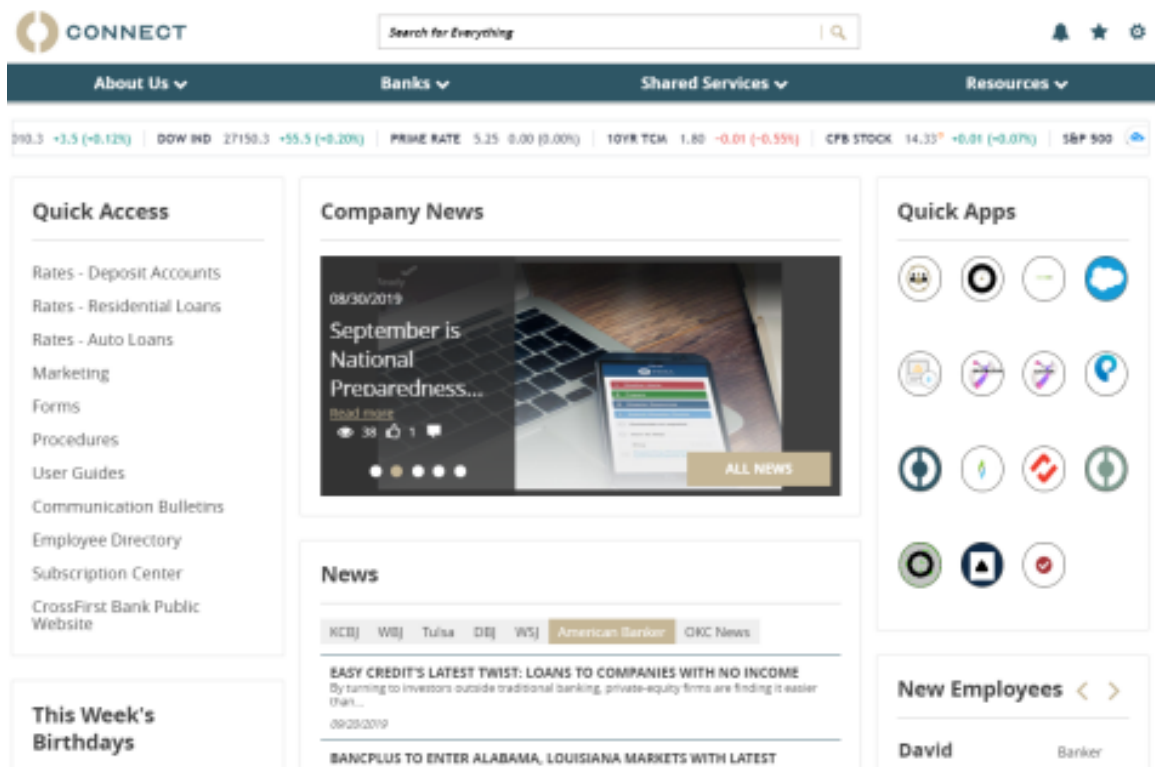
To begin the project, the CrossFirst Bank Technology and Applications Team partnered with their Process Improvement team to start down the path of building business requirements, scoping documentation, and detailing user-experience sessions with stakeholders across the company. After a 3-4 month build period, including scrubbing of all content to ensure relevancy/versioning control, the team successfully executed an internal intranet launch campaign which included infographics, email communication, webinars, live demos, and in-person meetings. During development, the team also ensured that the new portal would act as a supplement to the existing onboarding program and include guidance on what procedures, checklists, policies, and user guides to review. Once these have been completed, users are now instructed to attest to the completion of each key milestone through the Learning and Development site, accessed through Single-Sign-On (SSO) technology using the new CrossFirst Bank Intranet.



# Results

After building and deploying the intranet with the support provided by RSM, employee comfortability and adoption of the new portal became the main focus. Employee adoption was outstanding from the outset. Over 90% of employees utilized the new intranet in the first-week post-launch, and the bank continues to see strong increases in overall site visits and unique views. Total site visits were up 146% in the first 90 days alone. The improvements to the company infrastructure and employee experience have also been highly positive. Since the intranet was deployed, the search function has become a primary tool and is 400% faster than the previous search tool used. The new mobile app for bankers allows for access to important information and training materials from anywhere. Inefficient and outdated methods have been replaced so that content management has been simplified greatly. Single Sign-On has improved ease of access, and CrossFirst Bank branding changes can be managed more easily.

Some social aspects have also been improved such as the employee workplace now has a style that reflects the organization, employees feel more connected, finding contacts became convenient, and an app has been created within the site so that security guards can keep track of employees vehicles within the parking lot. Employee onboarding has also seen major growth as there is now the capability for employees to self-learn on their own time and in conjunction with more formal classroom-style training sessions.



Though the bank has its new digital workplace deployed and is beginning to reap the benefits, they continue to push forward with expanding their intranet site. Plans to include Yammer Network communication into the intranet are in the works, as well as adding product pages for Treasury Services, highlighting employee birthdays/anniversaries, and much more. Employees continue to have new ideas with feedback and improvements being suggested regularly – and all of this has been accomplished within the first year of the site deployment. Along with its partner RSM, Powell Software is proud to work with CrossFirst Bank to ensure that they have the tools and resources available to do their job effectively. Together, these companies will continue to work side by side in order to grow and find success



CrossFirst Bank was founded in October 2007 with the goal of serving the financial needs of their clients and to build trusted relationships within their community. Headquartered in Kansas with over 350 employees across 4 states within the US, this business & commercial banking focused organization has over \$4.5 billion in assets - making it the 3rd largest bank headquartered in the Kansas City metropolitan area. Under the NASDAQ ticker symbol 'CFB', CrossFirst Bank will strive to provide a level of service and trust to their clients that is the foundation for their growth & historical success.

RSM's unwavering focus on delivering a highly personalized and relevant client experience has remained the cornerstone of everything they do since their firm was founded in 1926. The RSM Client Experience is based on a client-centric focus, building long-term relationships and gaining a deep understanding of our clients' businesses, aspirations and challenges to provide relevant insights and solutions to help them succeed. RSM US LLP is the U.S. member of RSM International, a global network of independent audit, tax and consulting firms with more than 43,000 people in over 120 countries.

## About Powell Software

Powell Software develops digital workplace solutions that improve the employee experience, helping companies write their own "future of work" by leveraging the talent of their entire workforce.

