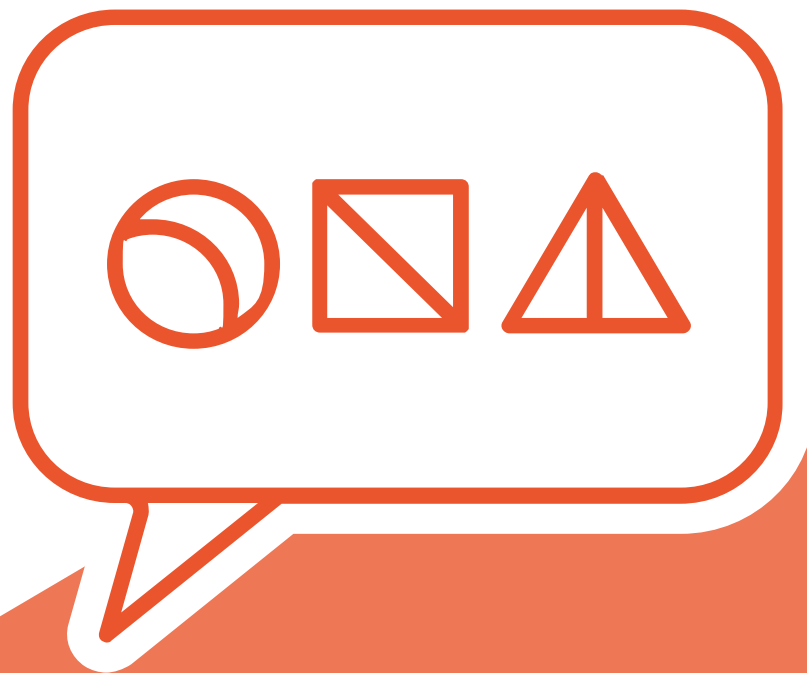


CASE STUDY

First Federal Savings Bank Achieves 360-Degree Customer View and Marketing Automation Success with 360 View



Executive Summary

First Federal Savings Bank faced challenges with siloed customer data and limited marketing capabilities that hindered their ability to effectively cross-sell and engage customers. By implementing 360 View's comprehensive CRM and marketing automation platform, they transformed their approach to customer relationship management. Within just four months of launching their first onboarding campaign, the bank sent targeted email communications to over 11,000 of their customers resulting in over 500 new product and service accounts, demonstrating significant improvements in customer engagement and product adoption.

About First Federal Savings Bank

Founded in 1904, First Federal Savings Bank is a trusted local financial institution serving communities across Indiana and Kentucky. With 10 convenient locations throughout Evansville, Newburgh, Henderson, Petersburg, and Washington, they combine the personalized service of a community bank with modern banking capabilities.

As a locally-focused institution, First Federal Savings Bank emphasizes building strong relationships with their customers while maintaining robust security measures in today's digital banking environment. The bank partnered with 360 View to enhance their customer relationship management capabilities, integrating it with their existing Cleartouch core system from Fiserv to better serve their growing customer base across retail, commercial, and digital banking channels.





Objectives & Challenges

Before implementing 360 View, First Federal operated with a limited CRM system with minimal data imports which provided visibility to only about 10% of their customer relationships. The bank's previous solution, Core IQ, was primarily utilized by the retail department, creating significant data silos between departments. Commercial banking products were entirely absent from the system, making it impossible for staff to identify cross-selling opportunities for business customers.

The bank's marketing team struggled with basic automation capabilities limited to birthday emails and customer service

surveys. Staff relied heavily on manual tracking through Excel spreadsheets, which was time-consuming and prone to errors. Without a centralized system, tracking prospect communications and customer interactions became increasingly challenging as the institution grew.

Furthermore, the lack of integration between systems meant that customer data was fragmented across multiple platforms, making it difficult for staff to access complete customer information. This fragmentation particularly affected the bank's ability to implement targeted marketing campaigns and track their success.

The 360 View Solution

After careful evaluation and a recommendation from Fiserv, First Federal Savings Bank chose 360 View for its comprehensive capabilities and seamless integration with their Cleartouch core system. The implementation included a full-scale CRM deployment with integrated marketing automation features, supported by 360 View's marketing mentorship program to accelerate adoption and campaign development.

The solution provided customizable dashboards for executive-level insights, advanced customer segmentation capabilities, and automated marketing journeys. A key feature was the integrated customer profiles that offered a complete view of product relationships, enabling more effective cross-selling opportunities.

The bank also leveraged 360 View's incident tracking system, which allowed for better cross-departmental communication and issue resolution. The platform's email marketing automation capabilities with built-in performance tracking helped the marketing team develop and execute more sophisticated campaigns.



Strategic Implementation

- Full-scale CRM deployment with integrated marketing automation capabilities
- Marketing mentorship program to accelerate adoption and campaign development
- Custom dashboard creation for executive-level insights
- Comprehensive training and support for multiple departments



Key Features Utilized

- Customizable dashboards for data visualization
- Advanced list creation and segmentation capabilities
- Automated marketing journeys
- Cross-departmental incident tracking
- Integrated customer profiles with complete product relationships
- Email marketing automation with performance tracking

Results

First Federal Savings Bank has seen remarkable success since implementing 360 View. Since launching their first onboarding journey, the bank has processed over 32,000 emails in the first 3 months and almost doubled their email volume compared to the previous year. Having welcomed over 400 new customers during the first 6 months, they have opened an additional 1,200 accounts through the success of the digital banking initiatives and targeted cross-sell emails.

The marketing team's productivity has significantly increased, successfully launching four comprehensive onboarding and cross-sell campaigns during their four-month mentorship period. They have prepared two additional campaigns ready for launch and are developing six more, demonstrating their growing capabilities with the platform.

- ✓ **Bank-wide adoption of the system with complete customer relationship visibility**
- ✓ **Processed over 32,000 emails through onboarding journeys in 3 months**
- ✓ **Opened 75 new deposit accounts as a direct result of cross-sell efforts**
- ✓ **New account openings increased by an average of 24% per month compared to the previous year**
- ✓ **Successfully launched 4 onboarding/cross-sell campaigns during the mentorship program**
- ✓ **Multiple campaigns initiated and in development as a result of the ease of the marketing automation tool**

Broader Impact and Future Outlook

The implementation of 360 View has catalyzed a fundamental shift in First Federal's approach to customer relationship management and data-driven decision-making. Staff members across departments now have access to comprehensive customer information, enabling more informed interactions and better service delivery.

Looking ahead, the bank has identified several strategic initiatives to further leverage the platform's capabilities. These include expanding their use of the incidents tracking system, implementing pipeline management across departments, and developing additional targeted marketing campaigns.

The foundation laid through this implementation positions First Federal Savings Bank for scalable growth, with the tools and processes in place to continue enhancing their customer engagement and cross-selling capabilities. The success of their initial campaigns has created momentum for continued innovation in their marketing and customer service approaches.

The bank's leadership views their partnership with 360 View as instrumental to their future success, particularly noting the value of the marketing mentorship program in rapidly developing their team's capabilities. The responsive support and industry expertise provided by 360 View have been crucial factors in their successful transformation.



360 View's team has been exceptional to work with, their knowledge about bank marketing and responsiveness to our needs has been invaluable. The marketing mentorship program, in particular, helped us rapidly develop and launch successful campaigns while building our internal capabilities.

Courtney, First Federal Savings Bank.

About 360 View

360 View provides comprehensive CRM and marketing automation solutions specifically designed for financial institutions. With a deep understanding of the banking industry, 360 View helps banks and credit unions transform their customer relationships through enhanced data visibility, automated marketing capabilities, and streamlined operational processes.

The image shows a man with glasses looking at a laptop. Overlaid on the scene is a screenshot of the 360 View CRM interface. The interface includes a navigation bar with 'myView', 'Customer View', 'Marketing', 'Reports', 'Maintenance', and 'Goals'. A search bar is present. The main content area displays a customer profile for 'TIM BENTLEY', a 'Personal Customer' at 'Platinum Level'. The profile includes a photo, tabs for 'Details', 'Addresses', 'Bookmarks', 'Groups', 'Reports', 'Files (1)', and 'Map'. The 'Details' tab is active, showing fields for Address (3802 COUNTY ROAD 69, WEST FARGO, ND 37135 U.S.A.), SSN/Tax ID (555-96-4833), Date of Birth (06/05/1987 (35 y.o.)), and Bank Contact (Dana Jorgenson). Below the profile, there are sections for '360 View Accounts', 'Relationships', 'Profitability', 'Contacts', and 'Activities'. A 'Ranking and Predictive Model' table is visible, showing columns for Rank, Plat, EOM Net Profit (\$5,000), M, and Consumer Product Demand.

360

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