



Customer Success Story | Financial Services

First Bancorp

How implementing workflow boosted business process efficiency and won over bank employees

The Challenge

There was a time when loan officers at First Bancorp, Southern Pines, N.C., would send approved loan packages to the bank's back office for data entry – and then brace themselves for whatever might come next. Long wait times. Lost or misplaced paper documents. Blind views into the process. Loan officers called this “the black hole.”

Add to that the bank's four imaging systems, mostly attained through acquisition, inconsistent business processes relying solely on email, and paper. In short, the true black hole was disorganization. First Bancorp needed a solution to close the black hole for good.

“There was paper everywhere. Everywhere you walked. Everywhere you went.”

– Jeannie Kearns, vice president of Document Imaging

The Solution

First Bancorp turned to OnBase. Adopting the enterprise information platform allowed the bank to sunset all four of its imaging systems, establishing in its place a single, centralized repository capable of storing all of the bank's content, accessible to every employee.

First Bancorp implemented OnBase in 2012, going live with storage and retrieval solutions, as well as a number of electronic workflows, including retail loans, deposits, signature cards, resolutions, IRA, CD and documents. Business process workflows, and the ease with which a user can create them, would become a turning point for First Bancorp.

**FIRST
BANK**

CUSTOMER

First Bancorp

SIZE

\$4.3 billion in assets

LOCATION

Southern Pines, N.C.


DEPARTMENTS USING ONBASE

More than 30, including:

- Appraisals
- Audit
- Branch Support
- Compliance
- Customer Service
- Finance
- Human Resources
- Information Technology
- Legal
- Lending
- Operational Risk
- Project Management
- Training
- Treasury Services
- Wire Department

One platform **Unlimited potential**

OnBase®
by Hyland



With a 360-degree view into the project, from data records and documents to conversations and emails, users make smarter decisions.

Installation began in July 2012. OnBase went live three months later, in September. “Yes, we really did stand up an enterprise solution in less than 90 days,” says Jeannie Kearns, vice president of Document Imaging.

Replacing the email-only business process with workflow

Implementing a series of electronic workflows eliminated the need to conduct transactional business through email and ridded the bank of all the inherent risks that come with it. Workflow management automates business processes, sharing tasks efficiently between employees. It also matches tasks with the bankers who can do those best.

For example, prior to OnBase, Deposit Operations team members would receive emails with attached documents. To approve those documents, the team would print the attachments, initial the documents and then forward the paper. Now those documents are routed through an OnBase workflow allowing team members to approve documents, as well as add notes and comments, electronically, preventing errors and omissions and speeding up the overall process.

A better view of work with case management

First Bancorp took another leap forward with OnBase case management. A case management application replaced the bank’s previous third-party project management solution, which leveraged a social media user interface, left projects and documents disorganized and didn’t allow for document retention.

“Comments, tasks, issues for projects, were all so jumbled up and on top of one another,” says Kearns. “And that was with only three projects in the system.” Now, with case management capabilities, First Bancorp tracks and updates dozens of active projects.

OnBase does this by both centralizing information and providing users with the tools they need to get the job done. With a 360-degree view into the project, users make smarter decisions. Reporting dashboards and audit trails of all activities increase transparency, support compliance and helps First Bancorp identify opportunities for improvement.

“The right workflow keeps everyone on target. It organizes, allows the task to move to different queues so the work is shared and available to all for processing. OnBase saves us hours and hours of work and has reduced errors tremendously.”

- Sandi Carr, Deposit Operations manager

The Difference

Point-and-click configurability: The solution’s point-and-click configurability allowed Kearns, who is not a programmer, to use checkboxes, radio buttons and drop-down menus to quickly configure and change solutions. No expensive, time-consuming and difficult-to-maintain coding or scripting.

A solution for the entire enterprise: Some of the 30 bank departments using OnBase include Loan Ops, Deposit Ops, Compliance, Mortgage, Legal, BankCard, Asset Resolution, Cash Management and HR. “OnBase is the end all, be all. And we’re very lucky to have an executive management team that stands behind that.”

A single enterprise information platform for managing content, processes and cases: “What sets OnBase apart the most is how pretty much the entire loan process, from start to finish, can take place within it. No other system I’ve worked with is set up to do that,” said Lola Black, Loan Ops Document Review supervisor.

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