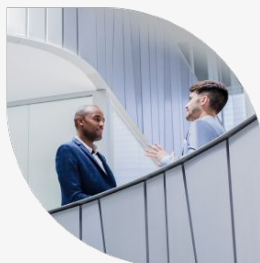


EBOOK

Bank and Credit Union Intranet Success Stories





— The backbone of your financial institution

Modern financial institutions face a unique set of challenges. Their success depends on staying compliant, while delivering excellent customer service by making sure front-line staff have easy access to the latest information.

These challenges underscore the importance of having a modern, interactive, and intuitive intranet platform. A well-designed intranet can help improve processes, speed up decision-making, and foster a sense of community across branches and offices, forming the cultural and informational backbone of your organization.

In this eBook, we'll highlight key intranet use cases for financial institutions. Then, we'll walk through how financial institutions are using ThoughtFarmer intranet to achieve their goals in the real world.



Intranet use cases for banks and credit unions

At ThoughtFarmer, we've been lucky to work with financial institutions across North America and beyond, and we've noticed some trends. Here are the most common use cases for how banks and credit unions leverage their intranet.

Streamline information sharing across branches

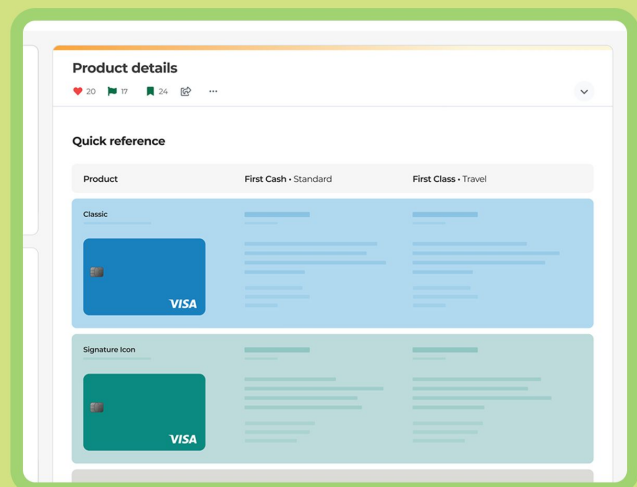
With staff spread across branches and offices, financial institutions need a reliable platform to serve as a central source of truth for information sharing.

When interest rates change or promotions are updated, time is of the essence. A well-designed intranet makes it easy for your corporate staff to quickly update content on products, policies, and processes and share it out to staff instantly, helping you maintain business consistency.

FEATURE HIGHLIGHT

Product comparison templates

Use pre-built financial product comparison templates to easily compare and share product details.





Enhance customer service

Customer-facing employees depend on up-to-date resources, like financial calculators and how-to guides, to provide customers with top-tier customer service.

An intuitive, well-organized intranet helps your staff identify exactly where to go to access the information and help they need.

The screenshot shows a 'Loan amortization calculator' form. It has a 'Loan intake information' section with fields for 'Initial loan amount' (10,000), 'Annual interest rate' (2), and 'Loan term' (5 years). A green 'Calculate' button is below these fields. The 'Loan amortization' section shows 'Monthly payments' as \$75.28 and 'Total number of payments' as 60.

FEATURE HIGHLIGHT

Loan calculator

Use the pre-built loan calculator to make it easy for staff to calculate and share loan amortization scenarios with customers.

Consolidate compliance information

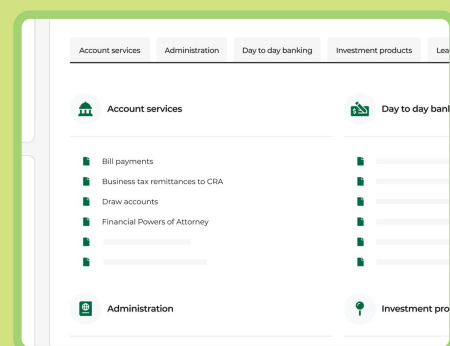
Financial institutions must comply with strict regulations around data protection, financial reporting, and anti-money laundering laws. Having compliance information accessible and at-the-ready is non-negotiable.

Centralizing compliance resources, training materials, and audit tools in one place helps organizations maintain regulatory adherence, reducing risk and keeping accountability across all departments and branches.

FEATURE HIGHLIGHT

Quick links

Create quick links to improve discoverability of critical compliance information, and accelerate the time it takes to find answers to frequently asked questions.





Explore our success stories

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How Coast Central Credit Union improved internal communications and employee engagement with their transformed intranet, Coastnet.

Industry
Financial Services

Employees
300

[Read full story](#)



Challenge

Internal communication challenges due to not having a centralized platform for disseminating information or managing documentation.

Multiplying inefficiencies with coordinating across teams or branches.

A disengaged workforce from a lack of culture-building opportunities.

Solution

Simple content creation and customization with creative themes.

Streamlined forms that enable automation.

The ThoughtFarmer customer support team who deliver quick and knowledgeable support and responses to issues.

Result

Centralized information sharing. Coastnet became the go-to source of information for all employee information and news, keeping everyone in the loop.

Improved community and connection. Employees across branches can easily see company celebrations, announcements, and CEO updates, and access the community hub, Coast Central Perk.

Streamlined processes by doing away with paper forms, making it easy to manage business cards, vacation requests, and more.

“

I love the ease with which we can just create a page on the fly really quickly and change things up. I like the layout, and how easy it is to use.”

Kandis Basinger
Training Manager at Coast Central Credit Union

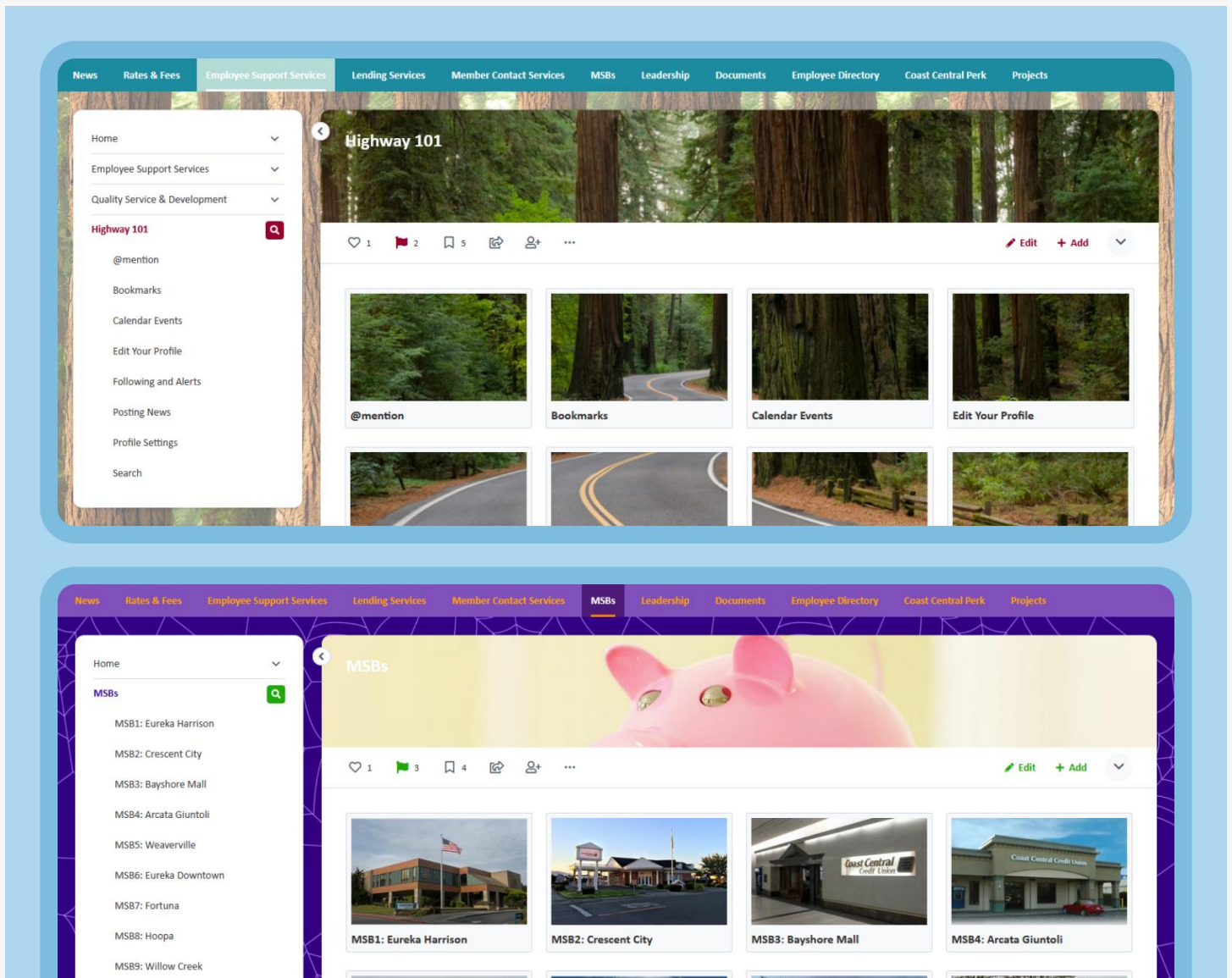


How Coast Central Credit Union improved internal communications and employee engagement with their transformed intranet, Coastnet.

Industry
Financial Services

Employees
300

Read full story



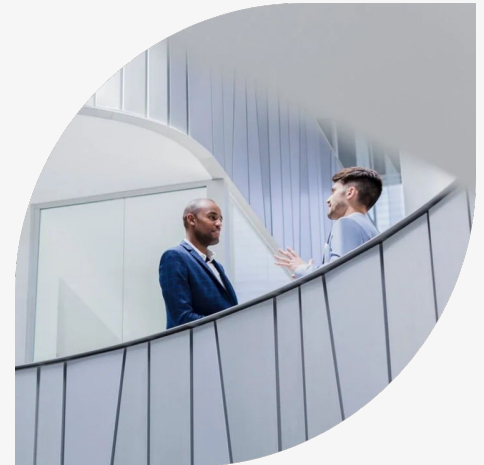


How DUCA moved from SharePoint to ThoughtFarmer, breathing new life into their communication and culture.

Industry
Financial Services

Employees
400

[Read full story](#)



Challenge

SharePoint's siloed and complex upload processes were time consuming and resource intensive.

The communication team was bogged down with department requests, slowing productivity and increasing inefficiency.

Limited opportunity for interaction hindered the creation of a connected culture.

Solution

A clean and organized interface made it easy for employees to navigate and search.

Easy content creation and management reduced their dependency on the communications team and sped up the delivery of time sensitive information.

Interactive capabilities enabled employees to like, comment, and interact with posts, leading to a more engaged and collaborative environment.

Supportive implementation and onboarding, with a customized set up, comprehensive training sessions, and ongoing support.

Result

Improved efficiency with employees now able to manage content on their own and find the information they need almost instantly.

Enhanced company culture, helping DUCA build a more connected and inclusive workplace environment.

Empowered employees, giving the team a sense of ownership over their contributions.

Better communication with transparent, real-time notifications to ensure no one misses critical information.

“

The improvements we've seen with ThoughtFarmer are remarkable. Our employees are more engaged, our communication is more effective, and the overall efficiency of our operations is so much better.”

Katrina Ferro-Longo

Manager of Employee Communications and Events at DUCA

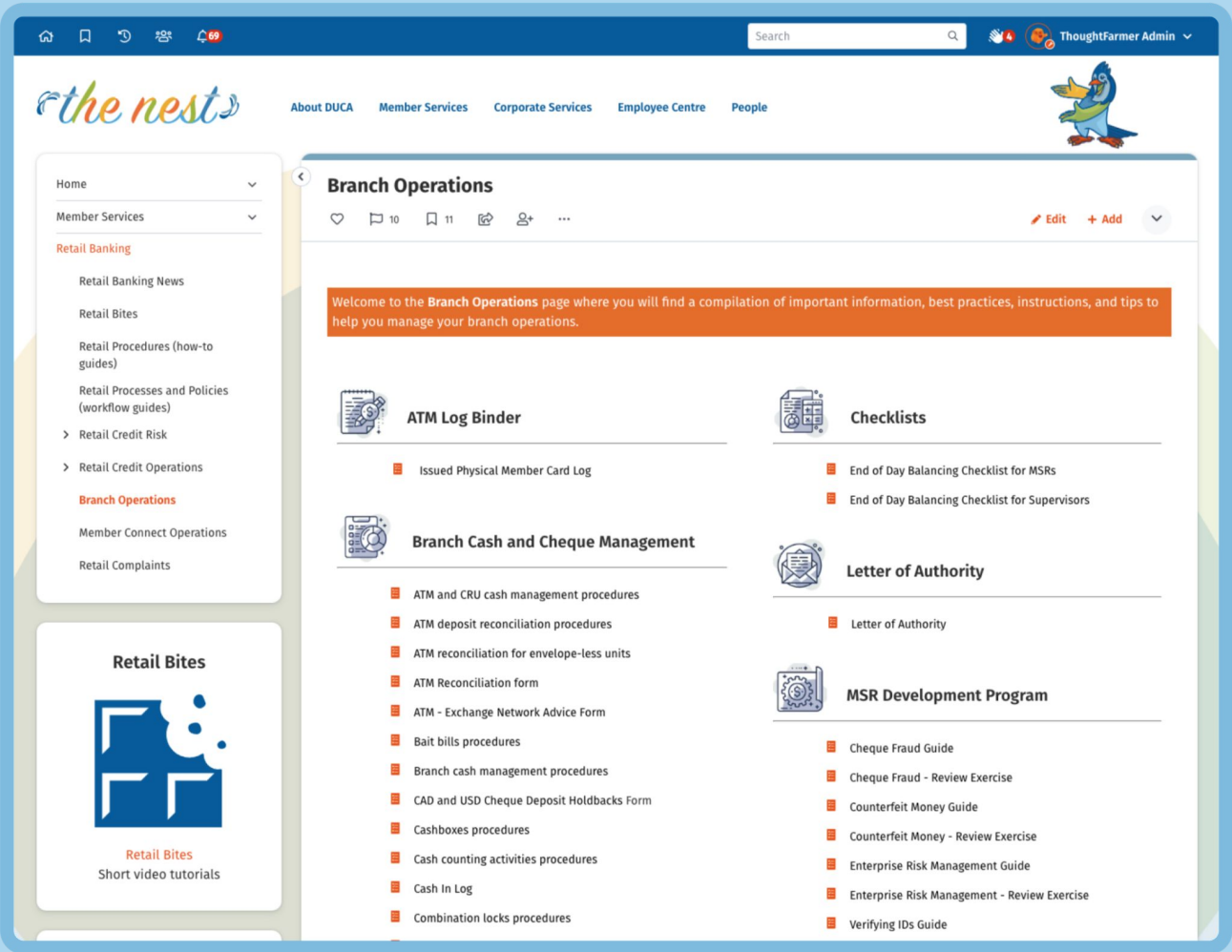


How DUCA moved from SharePoint to ThoughtFarmer, breathing new life into their communication and culture.

Industry
Financial Services

Employees
400

Read full story





How Cambrian Credit Union achieved a 96% intranet adoption rate with a well-designed and organized intranet from ThoughtFarmer.

Industry
Financial Services

Employees
400



Challenge

Cambrian's previous in-house intranet was outdated, serving as a limited basic document repository and staff directory with no interactive features, resulting in low engagement.

The ever-evolving finance industry made it challenging to ensure staff were up to date on important changes.

Important information was getting lost in staff inboxes because of overreliance on email for sending memos and forms.

Solution

True to its namesake, Cambrian's new intranet, MILO (Mountains of Information Logically Organized), helped bring order and visibility to company communications.

ThoughtFarmer's intuitive design system made it easy to update logos and custom graphics, keeping content fresh throughout the seasons.

Easy content management and a robust search functionality helped the team update and find information easily.

The Engagewear integration add-on kept multiple systems connected within one intranet platform, making it quicker for staff to search for what they need.

Result

Cambrian experienced a **96% adoption rate** and **improved per employee engagement by 22%** within two years of launching their new ThoughtFarmer intranet.

Improved communication by building an engaging intranet homepage that displays the most relevant information first.

Implemented a dedicated 'Cambrian in the Community' page showcasing up-to-date, interactive community-based content.

Increased searches by 40%, empowering employees to find and access the information they need when they need it.



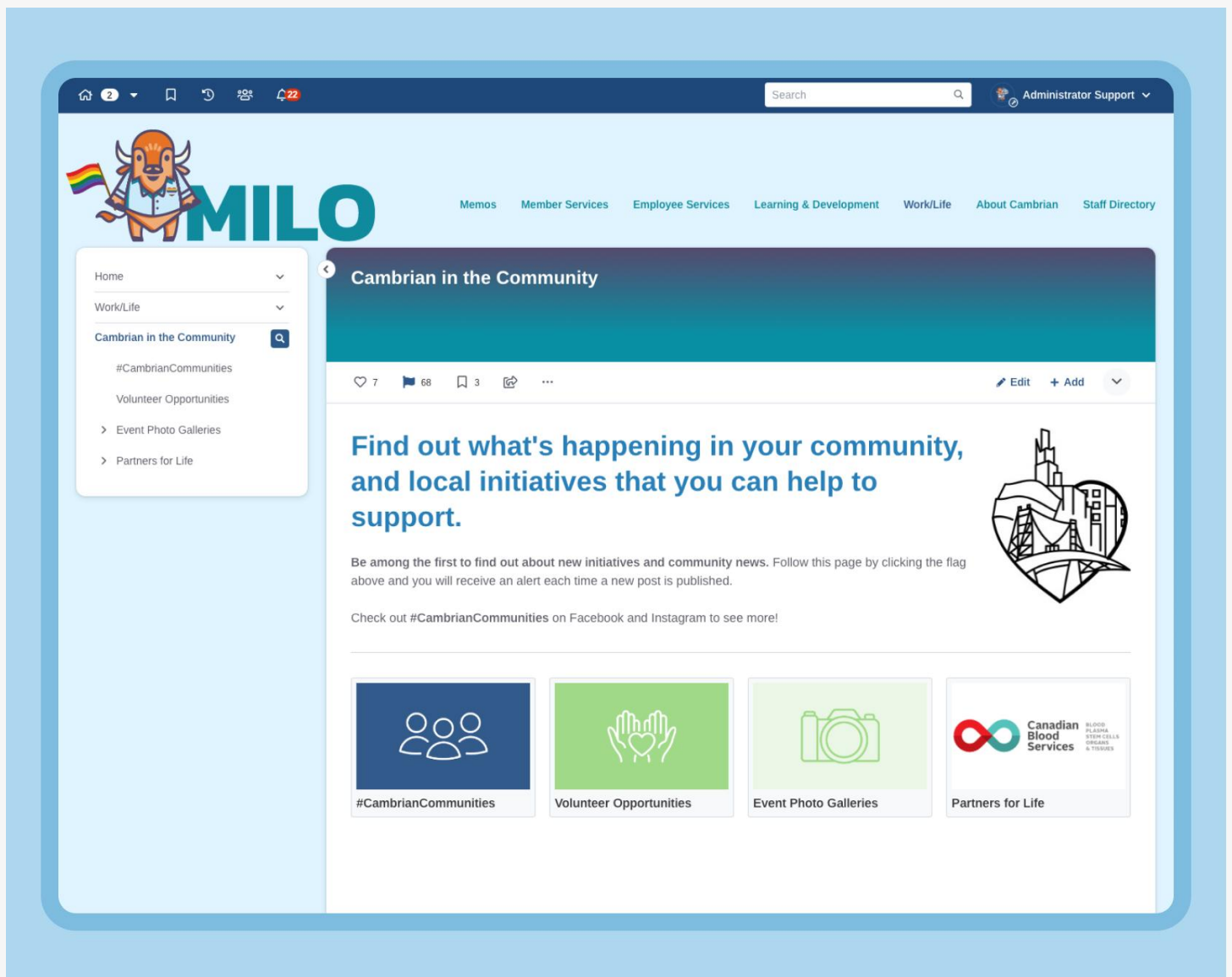
Cambrian partnered with ThoughtFarmer to bring their vision for an interactive, organized, and eye-catching intranet to life. Their new intranet, MILO's name, which stands for Mountains of Information Logically Organized, is a perfect description of both the challenge the team was facing and their approach to fixing it."



How Cambrian Credit Union achieved a 96% intranet adoption rate with a well-designed and organized intranet from ThoughtFarmer.

Industry
Financial Services

Employees
400





How JD Bank introduced a modern ThoughtFarmer intranet to elevate company culture and improve customer service.

Industry
Financial Services

Employees
240

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Challenge

JD Bank's previous Joomla-based intranet was difficult to support and not user-friendly.

The outdated intranet made it complicated to quickly locate and update crucial information.

Limited features prevented easy access to departmental information, forms, procedures, links, resources, and current news.

Solution

Powerful search functionality, making it easy for employees to find the resources they need.

A simple-to-update content interface, empowering employees across the organization to own and manage content.

An easy-to-use online form builder (FormFlow), automating key business processes like community investment service, expense reports, and logo apparel.

Result

Improved employee job performance and client services with a centralized, easy-to-navigate information source.

Celebrated JD Bank's culture with the ability to share photos, company events, and employee news.

Automated business processes with form workflows through FormFlow, an easy to use online form builder, doing away with pesky PDFs.

“

Our [ThoughtFarmer intranet] homepage gives us access to all the news and information that is relevant to us, at a glance. It also serves as a launch pad to critical business systems, and gives us one-click access to all our internal forms,”

David Wallace
Network Administrator for JD Bank

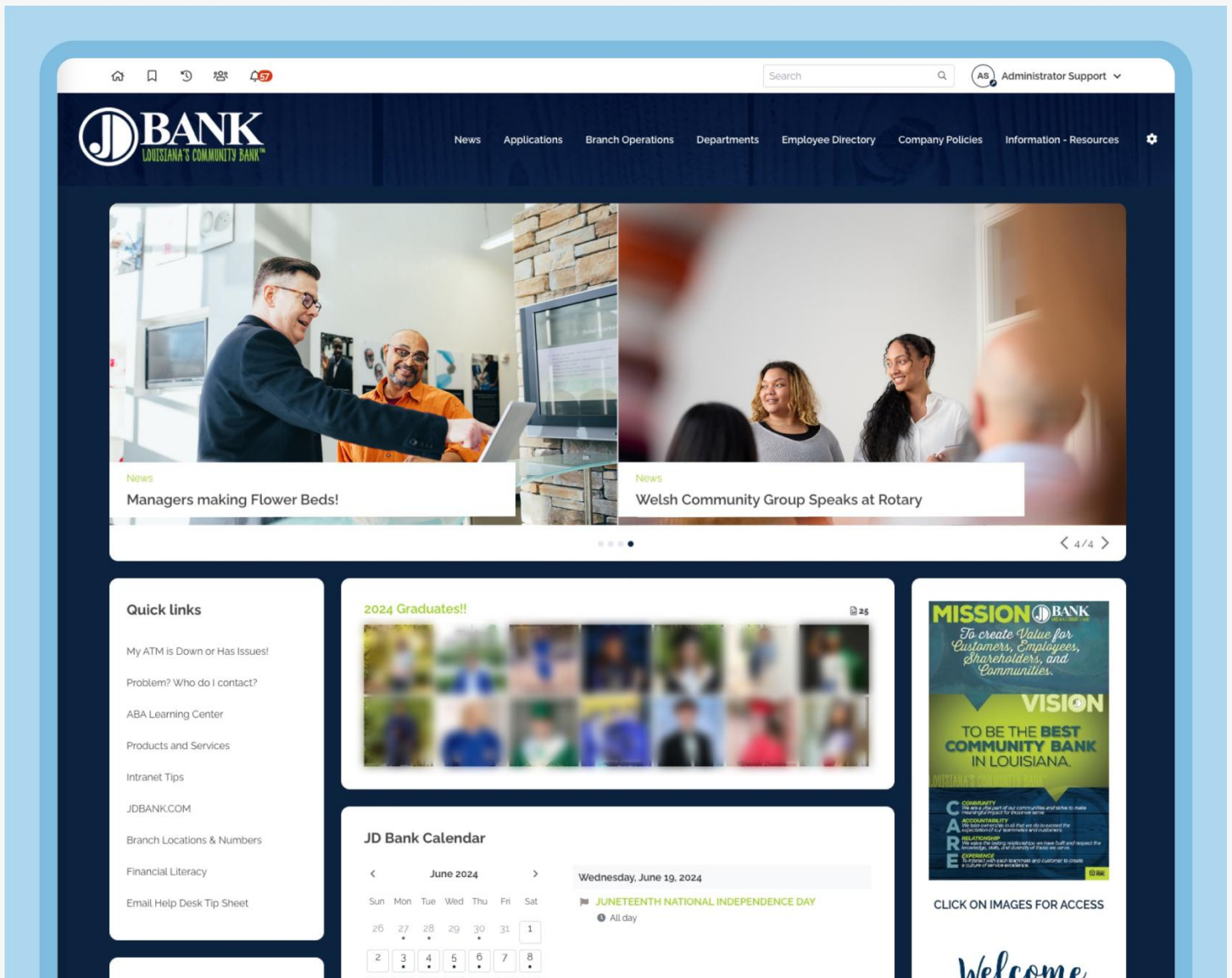


How JD Bank introduced a modern ThoughtFarmer intranet to elevate company culture and improve customer service.

Industry
Financial Services

Employees
240

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How moving from SharePoint to a ThoughtFarmer intranet helped Central 1 unify company culture under a mission of Service Excellence.

Industry
Financial Services

Employees
820

[Read full story](#)



Challenge

Central 1's SharePoint-based intranet was difficult to manage, leading to outdated content and an overreliance on email.

A lack of social and interactive features meant employees could not engage with content or share feedback.

IT needed to focus on creating value for members rather than fixing legacy systems, and wanted to transfer ownership of content updates to the Communications Team.

Solution

Straight-forward publishing tools that could empower their Communications Team to make timely and consistent updates.

Quick-to-launch and maintain technology that would free up their IT team from time-consuming legacy fixes.

Engagement tools that encouraged the entire team to get involved.

Expert support and Professional Services from the ThoughtFarmer team to help them launch faster and more successfully.

Result

Reduced intranet operating costs by over **70 percent**.

Increased employee engagement by **eight percent** in two years.

Measurable productivity gains for both the IT and Communications teams.

“

As a financial company serving banks and credit unions, Central 1 wanted a new intranet to help them embody the unique values of financial institutions. Moving from SharePoint to ThoughtFarmer's interactive intranet helped Central 1 transform from a product-based company to a member-centric company with measurable productivity results and cost savings.”



How Farm Bureau Bank (FBB) used ThoughtFarmer to build their organizational culture and unite the company as a team.

Industry
Financial Services

Employees
200

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Challenge

The previous intranet forced a top-down approach with all updates running through IT.

Limited social features prevented the entire FBB team from getting involved, engaged, and excited.

Solution

A customizable look and feel that ensured the intranet matched FBB's brand and public-facing website.

Easily accessible pages to host department information, company KPIs, news, project updates, policies, and more.

Integrations with other tools, like FBB's document management system.

Interactive polls that made it simple for their organizing committee to get employees involved and gather feedback.

Result

Huge cost savings with hundreds of person hours saved in the first year alone.

Improved information distribution and reduced reliance on email by giving teams access to information on demand.

Increased employee engagement and reinforced the roots of their corporate culture by keeping employees better connected and informed.

“

The support we get from ThoughtFarmer is phenomenal. Response times on help requests are great. We just wish all our vendors were that way.”

Richard Hamlin
CIO at Farm Bureau Bank



How Assiniboine Credit Union (ACU) achieved company-wide adoption with 93% of employees logging on to their new intranet at least once a day.

Industry
Financial Services

Employees
500

[Read full story](#)



Challenge

ACU's previous bare bones intranet had poor searchability and made it difficult for employees to locate important files.

This left the team with a stagnant, outdated file repository and not a functional internal website.

ACU had low employee satisfaction and adoption due to how challenging the previous intranet was to use.

Solution

Timely expert customer support and implementation services that made getting up and running with a new intranet fast and easy.

Document authoring records to encourage employees to provide feedback and collaborate.

Intuitive content management and design features that ensured creating and updating content was a breeze.

Result

Company-wide adoption with 93% of employees logging on to Mosaic at least once a day and 73% using the intranet once an hour.

Improved efficiency, problem-solving, and collaboration between frontline and back office employees.

Increased response times with employees providing responses to each other in Mosaic within minutes instead of taking hours to reply over email.

“

ThoughtFarmer had everything we were looking for in an intranet: a way to handle documents; a way to enhance communication; and a way for employees to connect with one another. Plus, we had to implement quickly. It's as though ThoughtFarmer was designed for us.”

Duane Nicol

Marketing and Communications Manager at ACU



Why choose ThoughtFarmer for your intranet

ThoughtFarmer has become the best-in-class partner for financial institutions – backed by almost 20 years of experience helping banks and credit unions build intranets that connect staff and unify information sharing across branches.

Here's how ThoughtFarmer can help you transform your intranet into high-yield wins:

- **Boost frontline efficiency** by making it easy for employees to find the right information at the right time.
- **Create a single source of truth** with a centralized, accessible repository for essential resources.
- **Streamline communication** across departments, branches, and offices to keep everyone aligned.
- **Ensure compliance** by housing all regulatory, security, and policy information in one location.
- **Encourage cultural connection** by uniting employees across branches and highlighting what makes your workplace unique.
- **Simplify document management** with tools that organize and maintain your documentation with ease.

With ThoughtFarmer, you're getting more than just an intranet – you're benefiting from a trusted partner that's committed to supporting your team's success.

See ThoughtFarmer in action

Book a demo

Learn more about
ThoughtFarmer solutions for **Banks**
and **Credit Unions**, including our free
Intranet Buyer's Guide for Banks, and
for **Credit Unions**

ThoughtFarmer

Where Teams + Ideas Grow 