



As a result of an Umpqua Bank transformation initiative, sweeping opportunities for change were identified by the bank's design, customer experience and brand strategy team. The changes involved the initial customer experience and the efficiency of operations in numerous departments within the bank as well as a multitude of vendors providing services required in today's banking environment.

CBG provided technological input and oversight throughout the creative and design phases, ensuring compatibility and/or interoperability with existing infrastructure. As the Senior Technology Consulting Firm for this project, CBG was responsible for translating the creative direction provided by the bank's marketing strategy team into deliverable solutions and ultimately managing the successful delivery of those solutions.

Rich Sauter

Vice President & Senior Technology Consultant - Umpqua Bank

CBG Delivers

CBG enhanced core IT infrastructure: We work closely with Microsoft, Cisco, and Intel/Lenovo as core technology partners to deliver creative solutions, leveraging existing infrastructure investments and establishing a baseline for which the enterprise can continue to scale not only in size, but through additional features. Implemented features included Cisco video chat between bank stores and back office experts, and integration with Microsoft's Virtual Earth product with a very large interactive Planar digital displays through touch enabled technologies.

CBG enhanced core Banking services: Banking capabilities were enhanced through the implementation of a best of breed banking CRM system (360view by inBusiness). The 360view product provides to bank employees a dashboard view of a customer's relationship with the bank as well other extended features, such as providing next product recommendations, lead/referral generation, and goal and incentives integration.

As part of our project role, CBG was responsible for all aspects of the technology implementation within concept bank branches featuring these new technology-rich customer focused features.

Results

Virtually all technology components CBG designed were able to reduce complexity in the customer banking experience, increased operational efficiency, reduced costs and enabled increased capacity for future growth. These elements were critical in the transformation to being a leader in next generation banking. CBG was able to employ technology solutions that enhance the "one-on-one" customer experience now and well into the future.

