**Case Study**

**fiserv.**

## CenterState Bank
### Branch Productivity and Service Improves With Help from Architect™ from Fiserv

Due to rapid growth, keeping customer contact information current had become impossible for branch personnel. Leveraging Architect, CenterState Bank streamlined and automated the process for 75,000 active online banking customers.

### Challenge

CenterState Bank was concerned about the impact of incorrect and incomplete contact information for many of its online banking users. Individual branches had historically been responsible for updating customer information, but limited branch resources combined with a growing customer base made ensuring the accuracy of customer data difficult.

As a result, the bank found inaccurate contact information was being fed to other applications, severely compromising CenterState Bank's ability to communicate with customers. Moreover, the bank's prior digital banking solution was limited in its ability to collect current contact information.

### Solution

Working with Fiserv, the bank used the the profile update feature within the software development kit (SDK) available with Architect. A pop-up message was generated to prompt 75,000 active online banking users to update their contact information, and the updated information was automatically fed into the account processing system.

### Client Profile

CenterState Bank is one of the largest community banks in Florida with more than $12 billion in assets and 78 branches throughout the state. The bank provides traditional deposit and lending services to commercial and retail customers, as well as correspondent banking and capital market services for 600 community banks nationwide.

## Results

Today, CenterState Bank has more accurate, updated customer contact information to improve its compliance and marketing initiatives.

In the first two weeks of launching the pop-up message, the bank received more than 20,000 customer contact updates, far exceeding the results a branch-level effort could have yielded in the same timeframe.

Management expects at least 40,000 of its online banking users will submit updated information within a year, leading to greater success with marketing campaigns. Meanwhile, branch personnel can increase their focus on assisting customers to meet their financial needs.

"To update contact information in our online banking and account processing systems, we enabled a contact pop-up that displayed upon every customer's next login. Customers were given the option to update or confirm their information. This feature has facilitated improved communications with our customers, not only for regular communications but also for marketing initiatives."

**Christina Zenchak**
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## Connect With Us

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