

# Modernizing Banking: From Legacy to Digital



Industry: Financial Services



## Challenge

A large regional bank struggled with process inefficiencies due to its rigid and rapidly aging branch technology. While back-office functions received regular software updates, branch technology had been left unchanged for several years, leaving the bank with a convoluted and disjointed legacy solution. The bank's existing technology spread critical customer-facing processes across multiple systems, which created data silos and a poor user experience.

The bank's legacy technology was both difficult to use and expensive to maintain. With their rigid existing technology solutions, even minor modifications to address routine compliance changes proved challenging for developers and costly for the company. The business invested significant resources every year into employee training. Workers spent hours

learning to use multiple complex systems to complete simple tasks. The bank's technology stack became so unmanageable that the business reverted to a paper-based system for customer onboarding, one of their core processes. At this point, it was clear: the bank's technology was holding them back. Process inefficiencies and data silos led to inaccurate reporting and poor visibility into bank operations. Modernizing these inefficient processes and unifying their disjointed data would be a massive undertaking but essential to the bank's survival.

*"The Macedon team consistently goes beyond being a development staff. They understand the business process to the point they can identify gaps in user stories and provide proactive solutions."*

— SVP of IT

## Solution

The bank entrusted Macedon as their expert technology partner in resolving its critical branch technology issues. The Macedon team worked with business leaders at the bank to build an initial onboarding application focused on small and medium business lenders. The application leveraged the Appian platform to automate critical tasks, integrate compliance information from disparate technologies, and improve overall system robustness. The Macedon team deployed the application to the bank's production environment, and the bank saw an immediate positive impact.

## Result

After the initial deployment, the Macedon team worked in tandem with business leaders to expand on the first application's success. Through the combination of a responsive, expert team committed to an Agile methodology and Appian's powerful low-code technology, the bank quickly added additional products to their new onboarding tool. Branch managers and staff enjoyed an improved user experience and increased productivity through the new onboarding application. Employees no longer had to be trained in multiple systems, manually key in data from customers, or worry about user error.

The business was so impacted by these overwhelmingly positive results that they expanded efforts to modernize their branch technology. The Macedon team added multiple core bank functionalities to the system, including day-to-day teller transactions, deposit account onboarding, and complex account maintenance. As the bank migrated all of its core branch processes into

this application, the business successfully centralized all branch transactions, reduced training burdens, and improved reporting across all 500+ bank locations. The enhanced user experience, reporting, and visibility continue to yield long-term cost savings for the bank.

Though banking software is notoriously resistant to change, evolving is necessary for businesses to thrive in this digital era. Even with disparate, complex systems, and outdated processes, modernization is possible with the right implementation partner and technology stack.

### Cost savings with unified data and modernized processes



Optimized reporting  
for 500+ bank  
locations



All branch  
transaction  
centralized



Less employee  
training



Reduced system  
maintenance



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### About Macedon Technologies

Macedon is a recognized leader in intelligent automation and cloud data solutions. We have deep expertise with industry-leading technologies that we leverage to solve our clients' unique challenges.

Our hybrid roles achieve better solutions faster than traditional development teams.