

First PREMIER Bank uses automation to grow ... without adding headcount

110 Workflows Translates to 6,600 Hours
Saved Per Year



First PREMIER Bank

Location

Sioux Falls, South Dakota

Website

firstpremier.com

Assets

\$3.4B

Founded

1986

Software Solutions

*jha*Enterprise Workflow™

“We knew we couldn’t just keep hiring more people,” stated Josh Van Hulzen, Vice President of Data Analytics and Operations Support at First PREMIER Bank.

“We needed to find a solution to help us grow while keeping expenses down,” Van Hulzen continues. “When we first signed with Jack Henry, we weren’t entirely sure how we would use *jha*Enterprise Workflow” – a solution that simplifies business processes by fully automating, streamlining, and standardizing procedures involving multiple steps, individuals, groups, departments, and systems – “but we knew it would be a beneficial product for us as we grew.”

The South Dakota-based bank has one simple driving desire: do better than yesterday for their customers, their community, and their employees. By focusing on automation, First PREMIER has been able to ensure people remain their primary focus while increasing transaction volume and limiting additional headcount.

Today, the bank has more than 110 workflows in production and runs 41,000 individual workflow instances, translating to a time savings of approximately 6,600 hours a year.

addressing disputes

One workflow – implemented in early 2019 – saved First PREMIER more than 900 hours alone in 2023.

By automating debit card, ATM, and ACH disputes – thereby improving process efficiency and eliminating mistakes – the bank has seen improvements across the board for customers and employees alike. “We implemented the dispute workflow to save time for our Operations Team, provide consistency across operational areas, and address disputes with multiple transactions,” explains Van Hulzen. More than just that, “it also means a quicker turnaround and better service for our customers.”

The workflow navigates frontline staff through a series of questions to gather key transaction information and passes the information to decision-makers.

“We’ve had disputes with over 100 transactions. But, once a decision is made, *jha*Enterprise Workflow does the rest,” says



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Vice President of Data Analytics
and Operations Support, First PREMIER Bank

Van Hulzen. “It posts the transactions to the customer’s account, refunds fees, generates a customer letter and files it, creates a CRM event to document the dispute information, and even integrates with Synergy eSign™ for required forms.”

standardizing deceased customer notifications

In October of 2023, First PREMIER implemented a new workflow to standardize and simplify the cross-department process for deceased customer notifications.

“Prior to this workflow, a deceased customer notification was processed differently depending on who received the notification,” describes Van Hulzen. “There was some inconsistency among the various departments, responsible parties weren’t always being notified, and important steps were sometimes missed.”

Now, front-line staff submit a CRM Service Event, which triggers a workflow. The workflow performs CIF and account maintenance, sends email notifications to specific individuals and departments, and launches additional service events to document the completed work and remaining manual steps.

“The biggest impact to us has been eliminating manual processes, mitigating risk by reducing manual errors, and providing consistency and continuity across the institution,” says Van Hulzen.

building successful workflows

When it comes to building successful workflows, Van Hulzen credits a strong team dynamic and the right people.

“Our Business Analysts have a wide breadth of banking experience and technical skills,” describes Van Hulzen. “Working closely with stakeholders, they’re able to recognize the impact of a process across the organization and tie individual needs and goals together. As these professional relationships have strengthened over the years, so have the efficiency and impact of our workflows.”

Van Hulzen maintains that *jha*Enterprise Workflow's significant impact on employee efficiency and customer satisfaction has been integral to the bank's long-term success.

"With EWF, we're quicker, more efficient, and provide a better customer experience. It's a powerful tool that we use to add more accounts faster, perform maintenance, and even fight fraud."

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