

Case Study

Driving Efficiency and Compliance with Nextenture Productivity Cloud

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Executive Summary

In 2024, North Shore Bank, a Wisconsin-based financial institution with 40+ branches, partnered with Nextenture, Inc. to implement the **Nextenture Productivity Cloud**. By digitizing task management, checklists, audits/forms, and AI-driven reporting, the bank reduced operational inefficiencies, improved compliance readiness, and empowered frontline coaching. Within the first year, the solution delivered measurable time savings and enhanced accountability, supporting leaner staffing models and a reduction in full-time equivalent (FTE). This impressive gain was achieved without any negative impact on customer experience or employee satisfaction.

This case study explores the drivers behind the bank's transformation, implementation outcomes, and the broader research context demonstrating why operational task management is now a necessity for financial institutions.





Background & Challenge

Community and mid-market banks face increasing pressure from three converging trends:

1 Rising Regulatory Complexity

Research by Deloitte (2023) highlights that compliance costs represent up to **10% of operating expenses** for small to mid-sized banks and credit unions, making efficiency in compliance management mission-critical.

2 Operational Strain with Leaner Staffing

Labor costs remain the largest expense line in retail banking. According to McKinsey (2022), retail banks can unlock **20–30% productivity gains** by adopting digital task management and workflow tools that standardize execution across branches.

3 Inconsistent Experiences

Inconsistencies in branch execution reduce both customer trust and sales effectiveness. Gallup (2023) research shows banks with highly engaged and well-coached frontline employees realize 23% higher revenue growth compared to peers.

Solution

Nextenture Productivity Cloud

In early 2024, North Shore Bank rolled out Nextenture's Productivity Cloud across its 40+ branch network.

The implementation included:



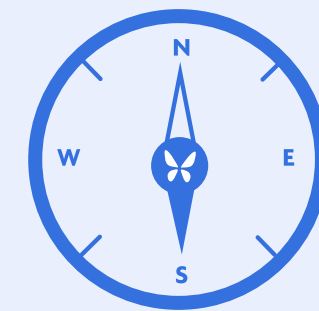
Task Management

Digitizing daily, weekly, and monthly branch tasks to ensure consistency and accountability.



Checklists & Forms

Standardized processes with built-in compliance checkpoints.



Audits

Centralized oversight, enabling real-time compliance monitoring and retraining where necessary.



Ai-Powered Reporting

Actionable insights into branch performance, coaching opportunities, and operational bottlenecks.

Results & Impact

The adoption of Nextenture Productivity Cloud generated measurable results across operational efficiency, compliance, and employee productivity.



Efficiency Gains



45 hours per quarter saved on audit processes.

675 minutes per day saved across branches via electronic task management.

15+ hours per month regained by operations leadership.

Compliance & Accountability



Immediate accountability and retraining through real-time audit visibility.

Centralized expertise replacing branch-specific subject matter experts, ensuring consistency.

Full electronic audit trails, reducing remediation effort and risk exposure.

Workforce Optimization



Reduction in branch FTEs, achieved without diminishing service levels.

Weekly time savings of **66 minutes per branch retail leader**, enabling focus on coaching and sales growth.

Cross-Departmental Collaboration



Enhanced coordination between Audit, Marketing, and Security teams.

Streamlined communication and task execution across the enterprise.

Research Context



The results at North Shore Bank reflect broader trends documented in financial services research:

Task Digitization

According to Accenture (2023), banks that digitize branch operations reduce time spent on manual reporting and compliance by up to **35%**, freeing leaders to focus on customer engagement.

AI in Compliance

PwC (2024) reports that AI-enabled compliance tools improve audit readiness by **40%** compared to manual monitoring.

Frontline Coaching

Harvard Business Review (2021) notes that structured coaching increases employee productivity by **19–25%**, aligning with North Shore Bank's observed sales coaching opportunities.

Looking Ahead

Building on its success, North Shore Bank plans to expand its use of the Productivity Cloud with:

Microsoft Teams integration for easy application access throughout the day.

Auto-routed forms to deepen inter-departmental collaboration.

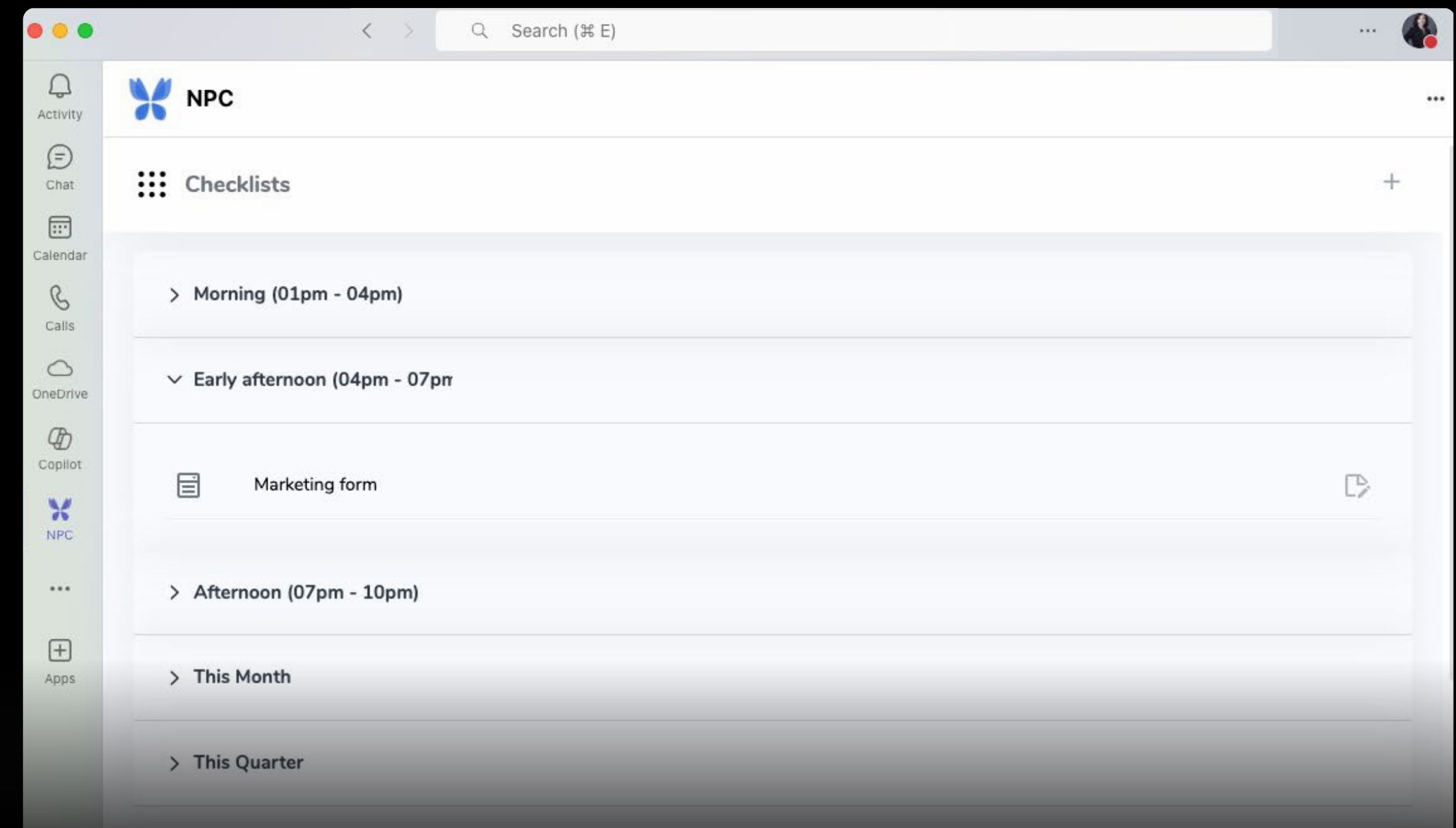
AI-driven insights to drive stronger performance and identify retraining opportunities.

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Productivity Cloud for
Financial Institutions



Get it from
**Microsoft Azure
Marketplace**



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Productivity Cloud

Task
Management

Customer
Appointments

Workforce
Management

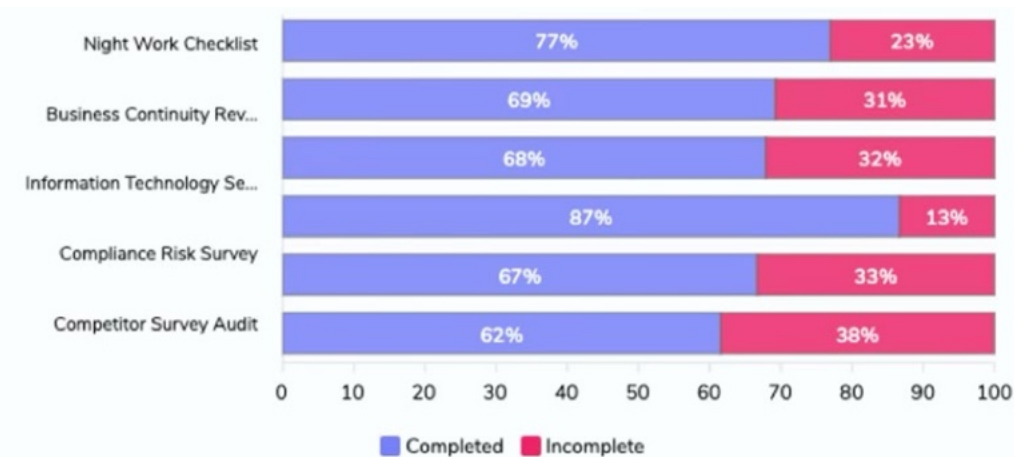
Learning &
Development



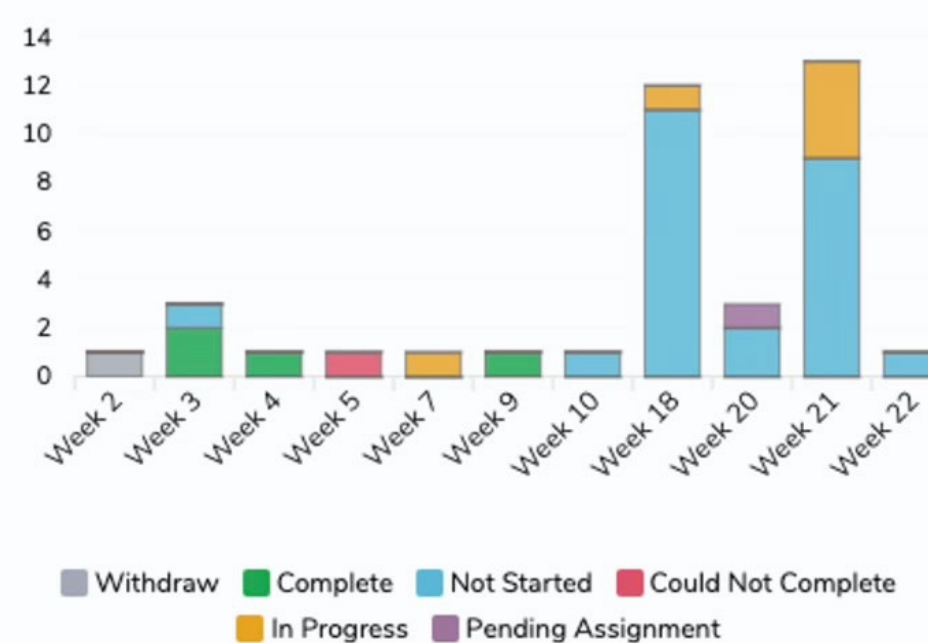
Conclusion

North Shore Bank's deployment of Nextenture Productivity Cloud demonstrates how community banks can transform operational consistency, compliance, and workforce productivity through digitized task management and AI-driven insights. Backed by industry research, the case illustrates the importance of moving beyond manual branch processes to a system that is efficient, scalable, and audit-ready. For financial institutions navigating staffing pressures and regulatory scrutiny, the North Shore Bank example underscores that **task management and compliance software are no longer optional—they are foundational to sustainable growth and risk management.**

Completion Rate



Tasks Completion



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