

First Federal Savings Bank gains customer insight and streamlines marketing automation with Abrigo's 360 View

Asset size

\$500 million

Financial Institution Type

Bank

Product

360 View CRM & Marketing

Summary

First Federal Savings Bank faced challenges with siloed customer data and limited marketing capabilities that hindered their ability to effectively cross-sell and engage customers. By implementing Abrigo's 360 View CRM and marketing automation platform, they transformed their approach to customer relationship management. Within just four months of launching their first onboarding campaign, the bank sent targeted email communications to over 11,000 of their customers resulting in over 500 new product and service accounts, demonstrating significant improvements in customer engagement and product adoption.

The challenge: Disconnected data limits capabilities and engagement

Before implementing 360 View, First Federal operated with a limited CRM system and minimal data imports, providing visibility into only about 10% of their customer relationships. The bank's previous solution was primarily utilized by the retail department, creating significant data silos between departments. Commercial banking products were entirely absent from the system, making it impossible for staff to identify cross-selling opportunities for business customers.

About the financial institution



Founded in 1904, First Federal Savings Bank is a trusted local financial institution serving communities across Indiana and Kentucky. With 10 locations throughout Evansville, Newburgh, Henderson, Petersburg, and Washington, they combine the personalized service of a community bank with modern banking capabilities. First Federal Savings Bank emphasizes building strong customer relationships while maintaining robust security measures in today's digital banking environment.

"360 View's team has been exceptional to work with; their **knowledge about bank marketing** and **responsiveness to our needs** have been invaluable. The marketing mentorship program, in particular, helped us rapidly develop and launch **successful campaigns** while building our internal capabilities."

Courtney

First Federal Savings Bank

The bank's marketing team struggled with basic automation capabilities limited to birthday emails and customer service surveys. Staff relied heavily on manual tracking in spreadsheets, which was time-consuming and error-prone. Without a centralized system, tracking prospect communications and customer interactions became increasingly challenging as the institution grew.

Furthermore, the lack of integration between systems led to fragmented customer data across multiple platforms, making it difficult for staff to access complete customer information. This fragmentation particularly affected the bank's ability to implement targeted marketing campaigns and track their success.

The solution: Unified customer intelligence and marketing

After careful evaluation and a recommendation from Fiserv, First Federal Savings Bank chose 360 View, now part of Abrigo, for its comprehensive capabilities and seamless integration with the bank's core system. The bank implemented a full-scale CRM solution with integrated marketing automation features. 360 View's marketing mentorship program provided support to accelerate adoption and campaign development.

The solution provided customizable dashboards for executive-level insights, advanced customer segmentation capabilities, and automated marketing journeys. Integrated customer profiles offer the bank a complete view of product relationships, enabling more effective cross-selling opportunities.

The bank also leveraged 360 View's incident-tracking system, which enabled better cross-departmental communication and issue resolution. Email marketing automation capabilities with built-in performance tracking helped the marketing team develop and execute more sophisticated campaigns.



The results: More targeted outreach and measurable growth

Since launching their first onboarding journey, the bank has processed over 32,000 emails in the first 3 months and almost doubled their email volume compared to the previous year. Having welcomed over 400 new customers during the first 6 months, they have opened an additional 1,200 accounts through the success of the digital banking initiatives and targeted cross-sell emails.

The marketing team's productivity has significantly increased, successfully launching four comprehensive onboarding and cross-sell campaigns during their four-month mentorship period. The marketing team also increased its campaign capacity. During a four-month mentorship period, employees launched four onboarding and cross-sell campaigns, prepared two additional campaigns for launch, and began developing six more.

Key outcomes included:

- 32,000+ emails processed through onboarding journeys in three months.
- 75 new deposit accounts directly attributed to cross-sell efforts.
- 24% average monthly increase in new account openings compared with the previous year.
- Four onboarding and cross-sell campaigns launched during the four-month mentorship period.
- Bank-wide customer relationship visibility to support more informed interactions across departments.



Building on a more complete customer view

For First Federal, the impact extends beyond individual campaigns. Employees across departments now have access to more comprehensive customer information, helping them make more informed decisions and provide better service.

The bank plans to build on that foundation by expanding its use of incident tracking, introducing pipeline management across departments, and developing additional targeted marketing campaigns. First Federal also credits the support it received during implementation with helping its team build confidence and develop campaigns more quickly.

Move from fragmented data to **cohesive** strategy and **measurable results**

[Learn more](#)

Strategic implementation

- Full-scale CRM deployment with integrated marketing automation capabilities
- Marketing mentorship program to accelerate adoption and campaign development
- Custom dashboard creation for executive-level insights
- Comprehensive training and support for multiple departments

Key features utilized

- Customizable dashboards for data visualization
- Advanced list creation and segmentation capabilities
- Automated marketing journeys
- Cross-departmental incident tracking
- Integrated customer profiles with complete product relationships
- Email marketing automation with performance tracking

About Abrigo

Abrigo is an AI-powered platform that helps U.S. financial institutions manage risk and drive growth. As a leading provider of software and services spanning lending, financial crime and compliance, analytics and intelligence, and customer relationship management, Abrigo brings together governed, explainable AI and trusted banking expertise in one connected platform. More than 2,400 institutions use Abrigo to improve efficiency and make informed decisions with solutions that work alongside their teams to help communities thrive. Visit abrigo.com to learn more.

