

GUIDE

Secrets to a great intranet:

7 Banks and credit unions that got it right



Company News
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-  Administration
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— Connecting People, Processes, and Information

Many banks and credit unions are adopting modern intranets to improve internal communication and provide better customer service. With intranet platforms such as ThoughtFarmer, it's easier than ever to build intuitive and feature-rich knowledge hubs that don't require IT support, and empower employees to communicate and collaborate.

In this guide, we'll show you real-life examples of how financial institutions are using their intranets to boost employee productivity and engagement.

Why an intranet?

An intranet is more than just a tool for communication—it's the backbone of your organization. By connecting employees across departments, branches, and roles, an intranet allows for easy information sharing and collaboration.

For banks and credit unions, this is crucial in maintaining compliance, delivering excellent customer service, and ensuring that all team members have access to up-to-date information.

Whether it's improving processes, speeding up decision-making, or creating a sense of community within the organization, a well-designed intranet keeps everyone aligned and efficient.



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Common intranet use cases at banks and credit unions

When you've worked with as many financial organizations as we have, certain patterns and use cases become noticeable.

Sure, a lot of intranets are used for similar purposes (communication, collaboration, and policy management etc.), but how specific industries tap into specific features is always fascinating for us. Many banks and credit unions seem to prioritize the following use cases:

Connecting branches

An intranet can unite financial organizations with multiple branches by providing a centralized platform where employees can share updates, best practices, and branch-specific news. This improves collaboration, helps employees learn about each other, and builds a sense of community across locations.

One recent customer was able to share retirement party photos with multiple branches by posting to their intranet. "We get to see what's going on with other branches, and they get to see what's going on with us, and nobody really feels left out when we're able to communicate like that," said Cathryn, Marketing Coordinator at Coast Central Credit Union.

Enhancing customer service

Financial organizations have a lot of customer-facing employees such as bank tellers, loan officers, branch managers, and call center operators. Information they depend on includes things like:

- Product information (account types, credit cards, and fees)
- Current interest rates
- Trouble-shooting tips for online banking
- Financial calculators
- Processes and how to guides

Having this information on their intranet makes it easier and faster for customer facing employees to find answers. Many of our clients even choose to have customer service information on the top navigation of their intranet so that it is always just a click away.



Maintaining business continuity

Business continuity is necessary for banks and credit unions to ensure uninterrupted access to financial services, safeguard customer trust, and comply with regulatory requirements. It also protects against operational disruptions, minimizing potential financial losses and maintaining the stability of essential operations.

For example, thanks to their intranet, one of our banking customers was able to quickly communicate updates to employees when a devastating tornado hit their region.

Creating a single source of truth

Intranets serve as the central hub for all employee information, news, and updates, ensuring that staff across the organization access consistent, accurate, and up-to-date content. This reduces the risk of misinformation, miscommunication, or confusion by providing a reliable source where employees can easily find the information they need, from policy changes to organizational announcements, all in one place.

Supporting mergers and acquisitions

During a merger or acquisition, employees rely on key information such as company-wide announcements on leadership and structural changes, HR updates about job security and benefits, operational changes to systems or processes, and legal or regulatory guidance. Access to this information ensures clarity, smooth transitions, and compliance throughout the process.

Centralizing compliance information

Banks and credit unions must comply with strict regulations, including data protection, financial reporting, and anti-money laundering laws. Having compliance information easily accessible on their intranet ensures that employees stay up to date with the latest policies and procedures, helping them operate within legal requirements. By centralizing compliance resources, training materials, and audit tools in one place, the intranet helps organizations meet regulatory adherence, reduces risk, and maintains accountability across all departments and branches.



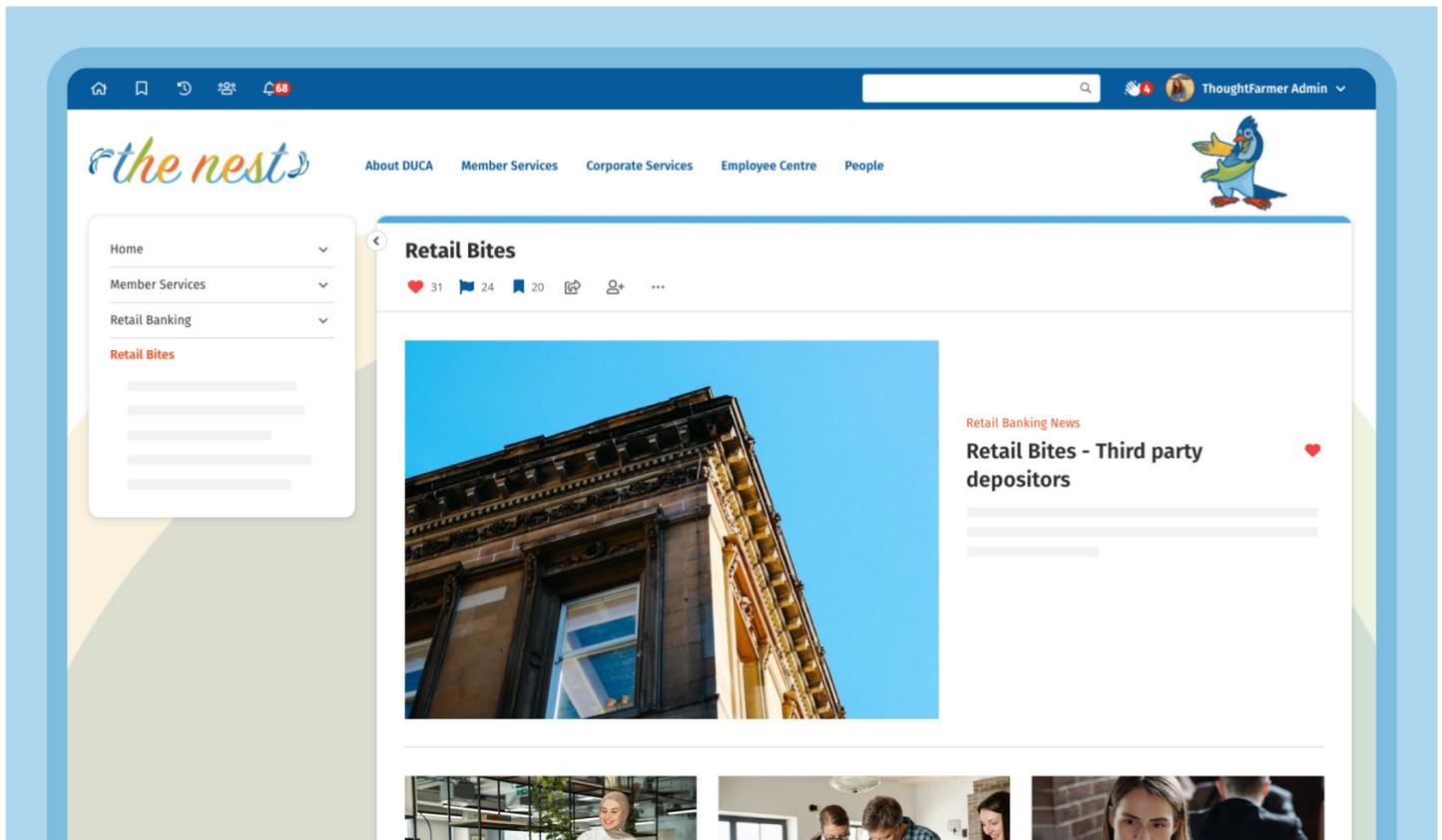
Success stories from credit unions and banks



DUCA

Moving away from SharePoint

DUCA Financial Services Credit Union faced challenges with their outdated SharePoint intranet. In search of a more user-friendly and collaborative solution, DUCA transitioned to ThoughtFarmer, which immediately improved internal communications, simplified workflows, and empowered employees to manage their own content. They boosted engagement through features like commenting and liking. With ThoughtFarmer's intuitive design and powerful search, DUCA transformed their internal communications, creating a more efficient and collaborative workplace.

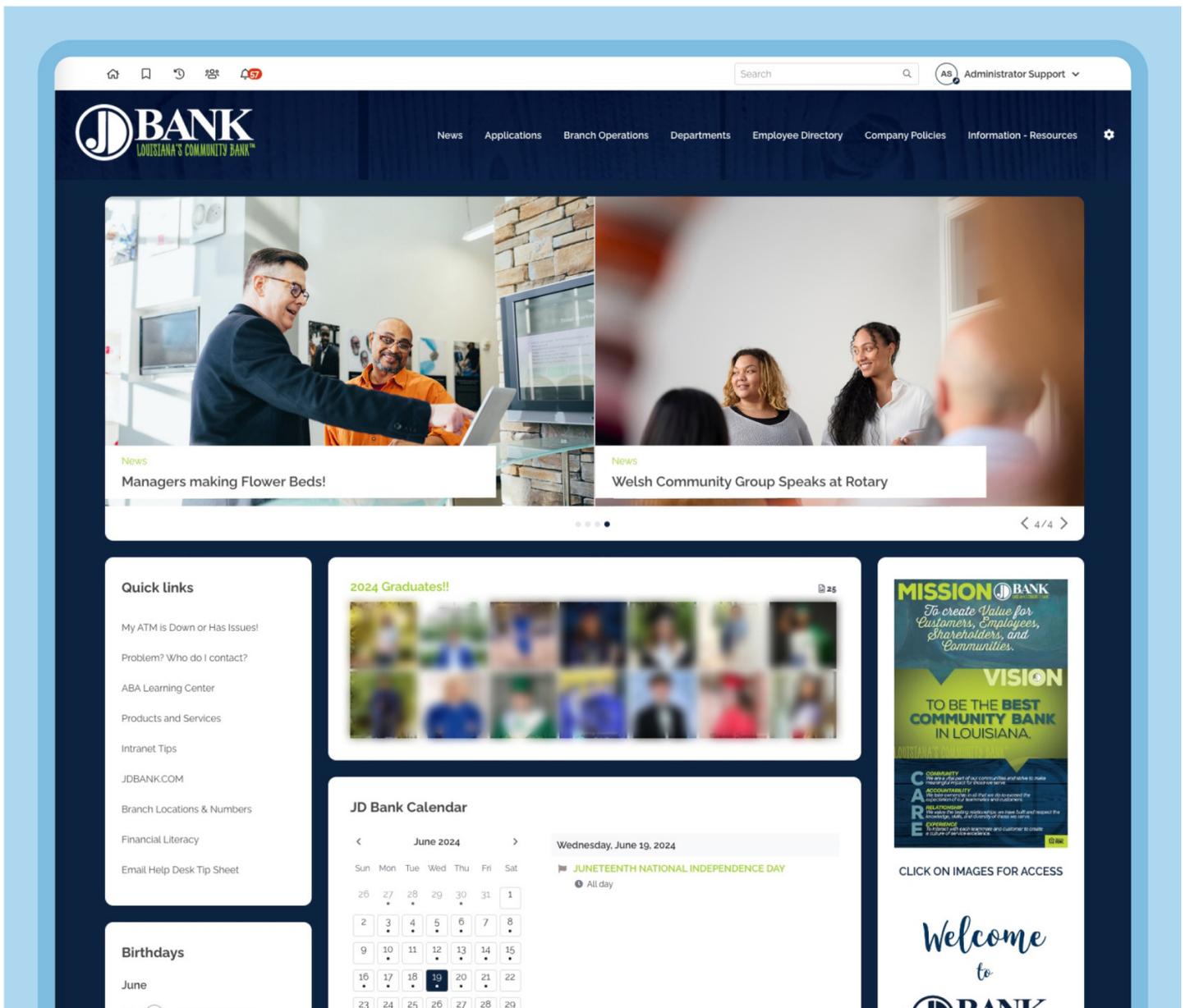




JD Bank

A central source of information

JD Bank, a Louisiana-based financial institution, sought a new intranet to replace their outdated Joomla-based platform. Their new ThoughtFarmer intranet created a central source of information that improved access to news, forms, and resources, saving time and reducing stress. ThoughtFarmer also helps JD Bank showcase their culture, with employees sharing photos and news, while a distributed content model empowers departments to manage their own sections. The intranet's modern search engine and FormFlow tool have improved business processes, and the marketing team continues to drive adoption through contests and engagement tactics.

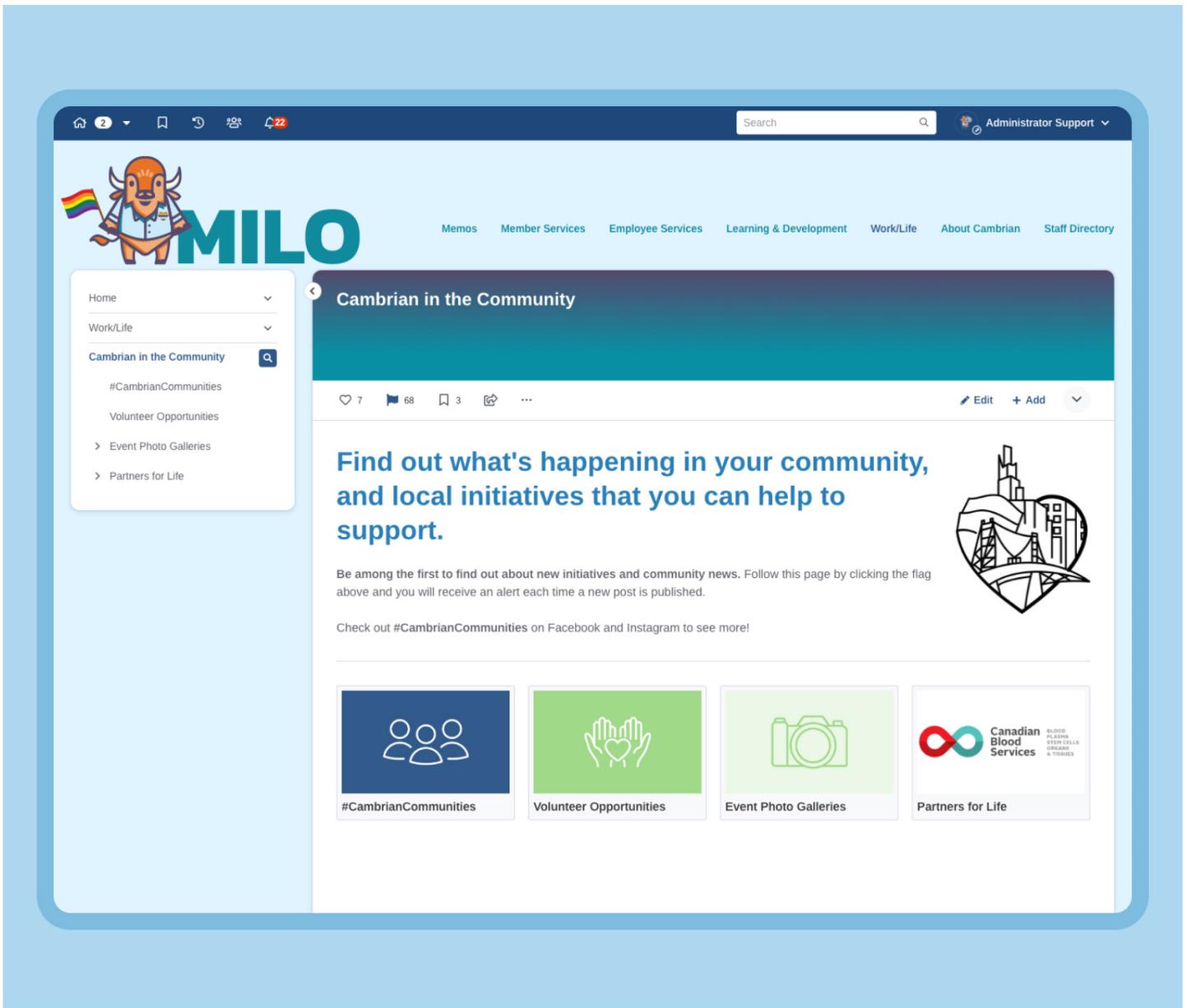




Cambrian Credit Union

Blending information and imagination

Cambrian’s intranet, named MILO (Mountains of Information Logically Organized), is chocked full of thoughtful design elements. They also have an adorable mascot—which goes a long way in encouraging intranet adoption. MILO helps prevent lost communications by showing key information on the homepage with custom graphics. Regular design updates, including seasonal mascot changes, keep the intranet fresh and interesting. MILO effectively shares important information, and strengthens company culture through its thoughtful design.

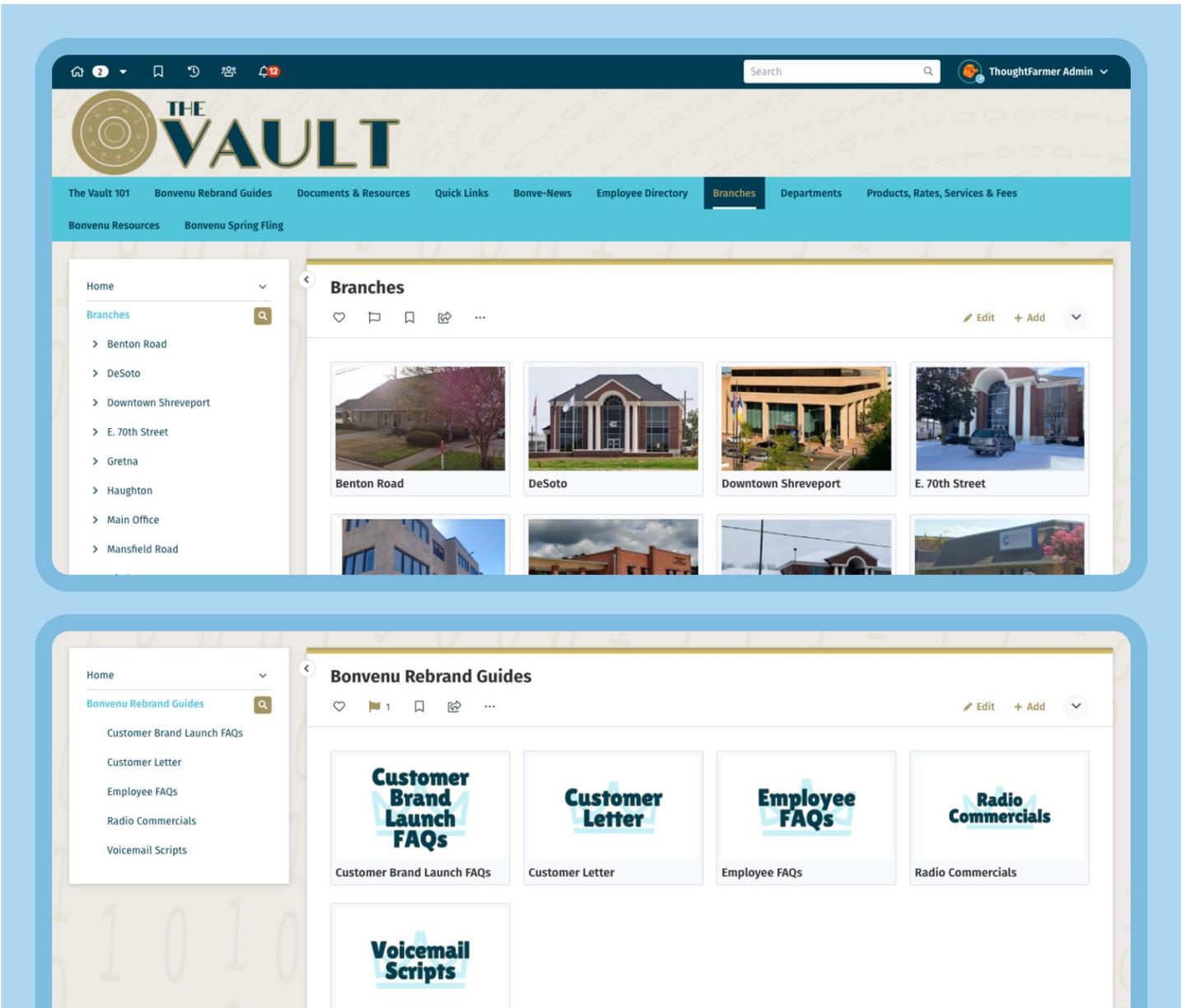




Bonvenu Bank

Uniting employees during a rebrand

As part of a rebranding process, Bonvenu Bank, previously known as Citizens National Bank, upgraded their intranet. Their intranet, named The Vault, has a lovely visual theme that ties in the colors of their new brand which is consistent across the bank. They've also done a great job using their intranet for employee recognition. Anytime an employee earns recognition, they earn credits to the Bonvenu Swag Store. With a new name and logo, earning credits has helped employees update their wardrobe.

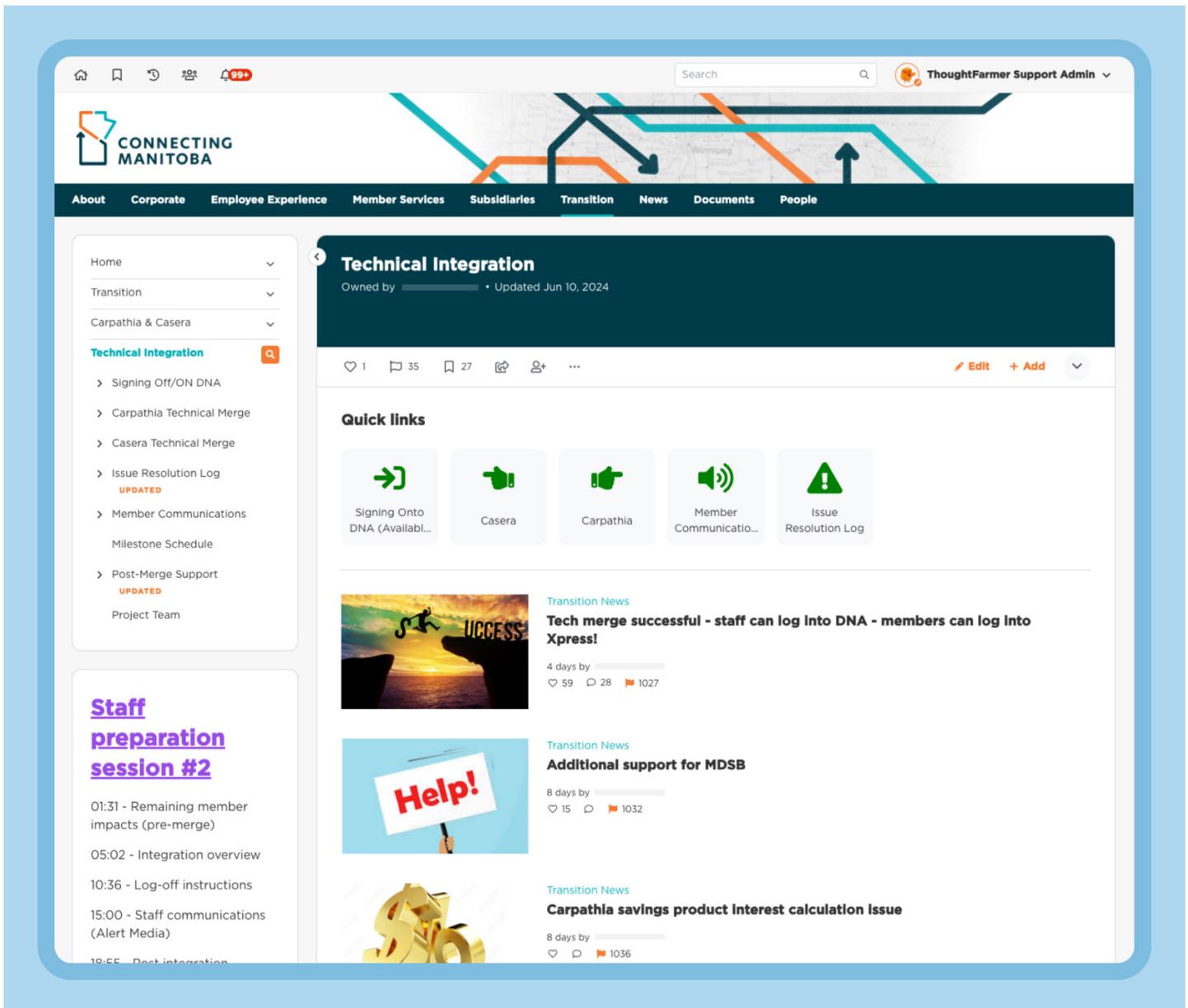




Connecting Manitoba

A hub for merger success

Connecting Manitoba, or Connect MB, was created as the go-to hub during the merger of several credit unions across Manitoba, Canada. They needed a single platform to share information about all merger and integration activities. Their intranet design team crafted a look that perfectly captured their goal of connecting communities and credit unions throughout Manitoba. They selected vibrant and engaging colors and graphics that reflected the values and brands of the merging credit unions.

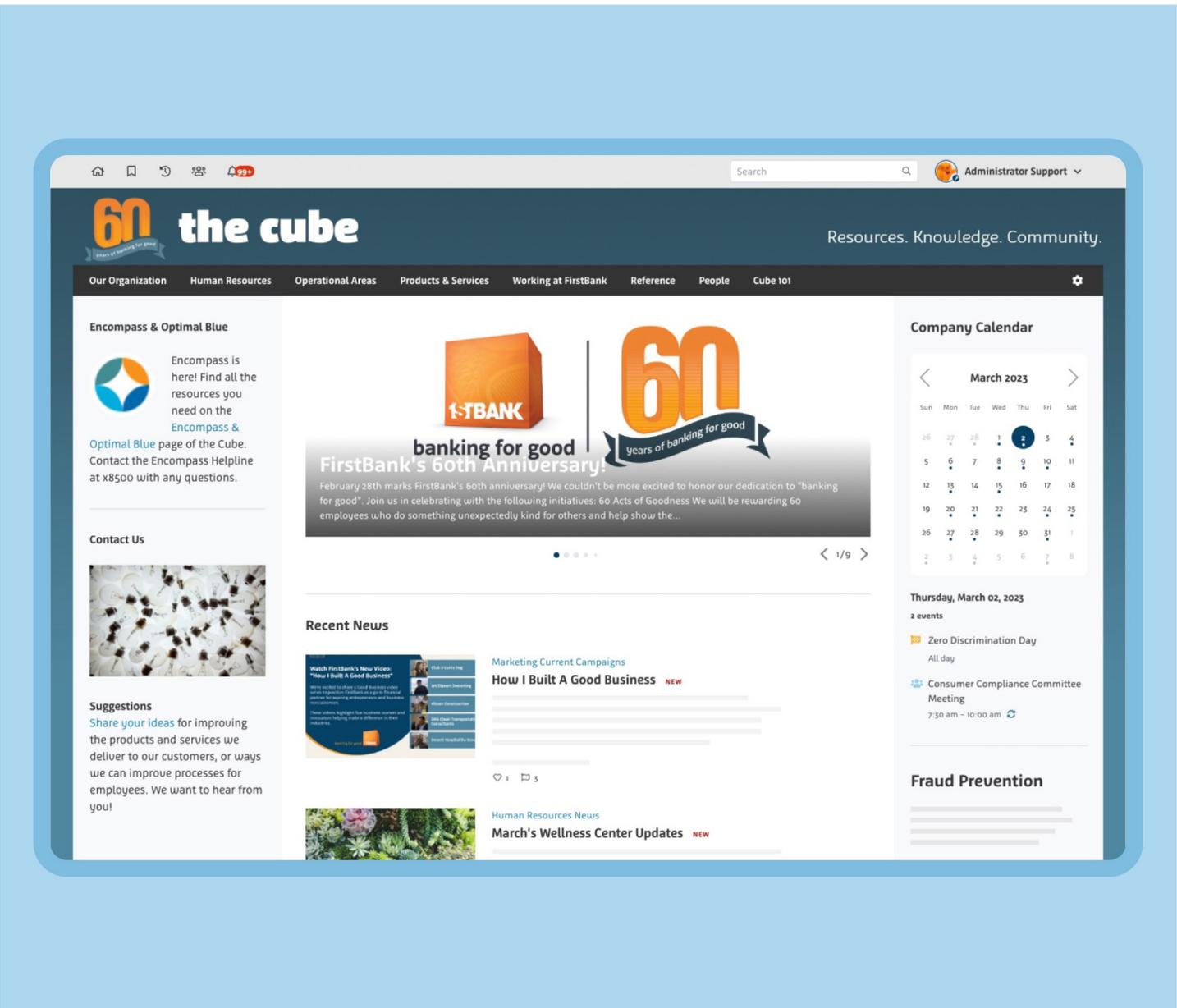




FirstBank

An intranet-driven DEI success story

Diversity, equity, and inclusion (DEI) work is challenging and requires dedication, strategy, and collaboration. FirstBank has set an inspiring example with their commitment to DEI, including a dedicated committee and employee resource groups (ERGs) that are fully integrated into their intranet. FirstBank uses various ThoughtFarmer features to promote inclusivity, like including options for name pronunciation and pronoun fields in their staff directory. By making DEI resources easily accessible, and fostering transparency, FirstBank creates an inclusive and accountable workplace others can learn from.

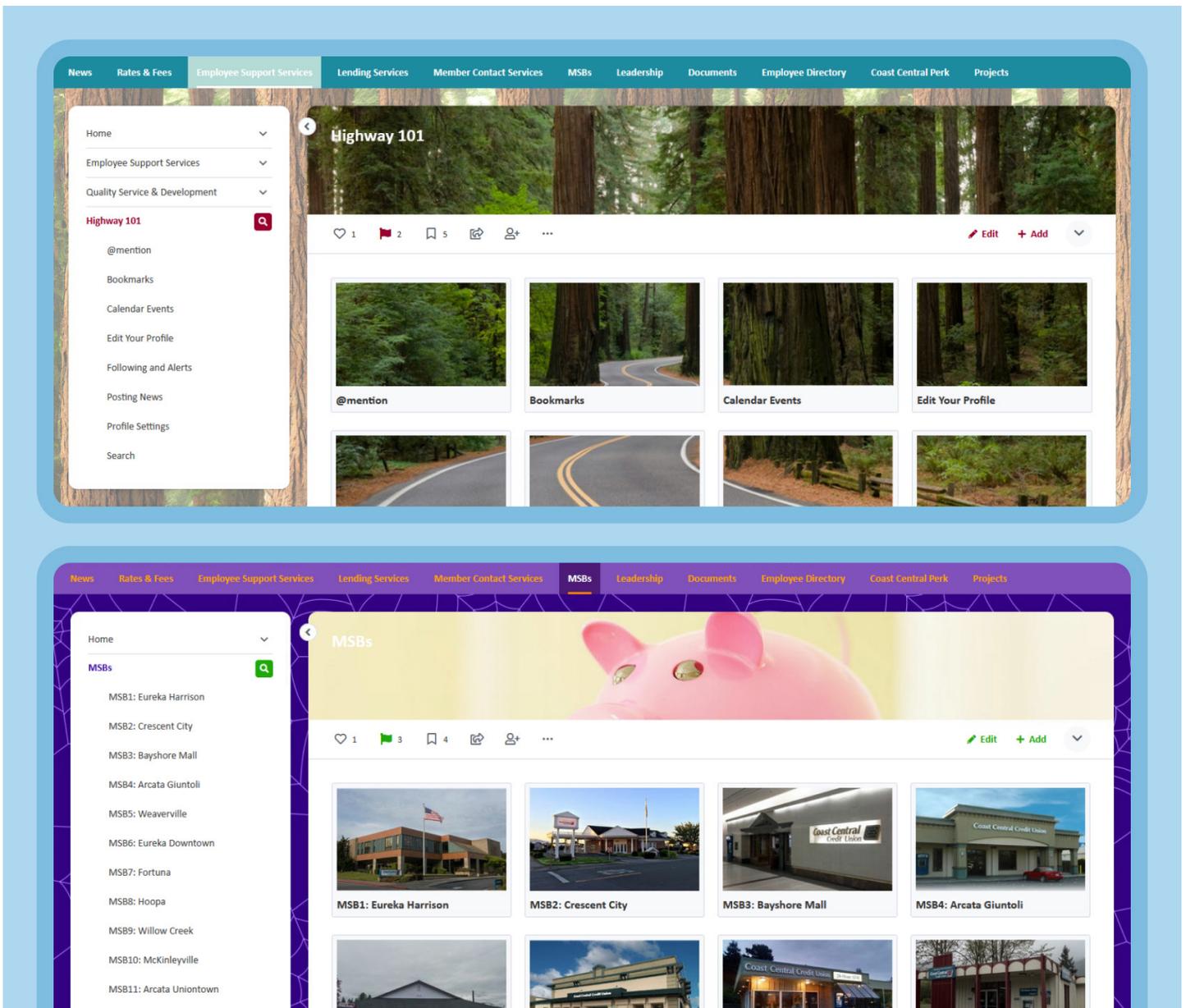




Coast Central

Connecting branches and cultivating community

Changing Coast Central’s intranet from an outdated system to ThoughtFarmer’s easy-to-use platform has brought great benefits to the California-based credit union. The switch fixed support and communication problems and also improved the company’s culture and employee engagement. As their Marketing Coordinator noted, “ThoughtFarmer achieved the perfect intranet trifecta: maintaining open communication, being user-friendly, and having an attractive design.”





Key intranet features for financial institutions

Choosing the best intranet for your bank or credit union means looking beyond basic communication tools. It's about finding a solution that empowers every team member, simplifies workflows, and enhances the organizational culture. Here's what to prioritize:

Comprehensive employee directory

An easy-to-use directory is essential for connecting team members across various locations, simplifying the process of finding the right person for any task or project.

Central knowledge hub

A unified source for all bank-related information, from product updates to compliance guidelines, ensures everyone can access the most current and accurate data. This is crucial for facilitating knowledge sharing and enhancing collaboration.

Digital forms and workflow automation

These tools are vital for modernizing processes, minimizing manual errors, and reducing paper.

Tailored news feeds

Personalized updates keep employees at all levels, from corporate to branch, informed about relevant news and strategic objectives.

Accessible policies and procedures

Making policies and procedures easy to navigate supports a culture of compliance and consistency across your operations.

Efficient document management

A strong document management system is key for facilitating collaboration, ensuring proper version control, and maintaining data integrity.



Industry specific features

This could include an ATM status indicator, a branch locator, or a loan calculator.

Intuitive navigation and search

The ability to Find information quickly with advanced, user-friendly search and navigation tools.

Flexible UI

The ability to brand and customize your intranet, creating unique and personalized user experiences

AI

Create, edit, and polish quality content, from a simple prompt, within your existing workflow.

Data analytics

Gather comprehensive insights into how employees engage with your intranet content to easily track key performance metrics.

When evaluating intranet platforms, consider how well they address specific challenges in the banking sector. Look for functionalities that include secure financial data management, compliance training capabilities, and integration with existing technology.



— Why Choose ThoughtFarmer?

With years of experience partnering with banks and credit unions, ThoughtFarmer understands the unique challenges and needs of the financial industry, and we have launched countless intranets for companies just like yours.

As the #1 intranet platform for the banking industry, we have developed specific features and site templates that appeal to financial services organizations.

We've helped institutions of all sizes build intranets that enhance communication, boost collaboration, and ensure employees have the tools they need to deliver exceptional customer service. Our deep knowledge of the regulatory environment and operational demands means that we create solutions tailored to the specific goals of financial organizations.

Our flexible design enables you to tailor the look and feel to suit your brand, creating an engaging hub that employees will come back to again and again.

When you choose ThoughtFarmer, you're getting more than a platform—you're getting a trusted partner that's committed to ensuring your team's success.

Visit thoughtfarmer.com/get/demo to schedule an intro call with one of our experts to learn more about ThoughtFarmer.

Thanks for reading!

Take the first step towards making work better

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