

CLIENT SUCCESS STORY

# Texas Bank Streamlines Customer Onboarding Process with KnowledgeLake



Vantage Bank Texas, a family-owned, community-based financial institution, sought to enhance business processes like customer onboarding by digitizing their document storage and retrieval system. Their goal was to reduce physical storage space and provide instant access to relevant documentation from within any application. To achieve this, they wanted to transition from paper-based processes and implement standard indexing practices.

**Client**

Vantage Bank Texas  
[www.vantage.bank](http://www.vantage.bank)

**Industry**

Financial

*Founded in 1923, Vantage Bank Texas is a family-owned, community-based financial institution offering a full range of banking products for consumers and small and medium-sized businesses in Fort Worth, the Rio Grande Valley, San Antonio, Laredo, El Paso, Hondo and Refugio.*



“We were looking for a way to streamline our business processes for storing and retrieving documents. KnowledgeLake’s integration with M365 and SharePoint Online, and previous track record, were the driving factors in our decision.”

– Danny Knudsen, Vice President and Solution Design & Development Director  
Vantage Bank Texas



## BUSINESS NEEDS

Previously, Vantage Bank Texas had deployed an on-premises KnowledgeLake Capture Server Pro solution. However, they encountered challenges with their hybrid environment and ultimately decided to make the switch to KnowledgeLake Cloud. Danny Knudsen, Vice President and Solution Design & Development Director, says, “The transition to the cloud has been quite successful.

The implementation team made the switch very easy and seamless for the end users.”

KnowledgeLake, which integrates seamlessly with M365 and SharePoint Online, enables Vantage Bank Texas to leverage their existing Microsoft investment.



## SOLUTION

Vantage Bank Texas currently utilizes KnowledgeLake in Lending and Treasury Management, with support from multiple back-office departments. The solution plays a vital role in their customer onboarding and renewal processes by connecting customer-provided documentation to the various approval processes.

Document types are scanned and uploaded to SharePoint Online, with the assistance of LOB system connections that facilitate quick indexing for easy retrieval. All documents undergo a workflow process to ensure accurate indexing and provide additional indexing information.



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**KnowledgeLake**



“We want to be able to take advantage of the latest functionality as soon as we can, especially as it pertains to API integrations. We are looking forward to making use of the KnowledgeLake APIs to further integrate the solution into our other applications. We are going through our own internal transitions to the Cloud, and the KnowledgeLake Cloud fits into those initiatives very nicely.”

– Danny Knudsen, Vice President and Solution Design & Development Director  
Vantage Bank Texas



## BENEFITS

By implementing KnowledgeLake, Vantage Bank Texas has significantly improved the efficiency of their document-related processes. They now have a centralized entry point for all their content, along with intelligent connections to LOB systems.

This standardized approach allows their users to easily image, index, and store numerous documents in their content management system. Transitioning to the KnowledgeLake Cloud has enabled Vantage Bank Texas to offload infrastructure support and customize integrations through the API. This flexibility empowers them to tailor the solution to their specific business needs.

Additionally, Vantage Bank Texas has found in KnowledgeLake a reliable technology partner, known for their commitment to product improvement and exceptional customer support.



“We have found the KnowledgeLake systems to be very reliable and the support to be extremely responsive ... KnowledgeLake’s Cloud and new API offering show they are committed to improving and establishing themselves as our go-forward partner.”

– Danny Knudsen, Vice President and Solution Design & Development Director, Vantage Bank Texas