



Case Study

Washington Trust Bank



Washington Trust Bank provides financial services to communities throughout Washington, Idaho, and Oregon.

Headquarters: Spokane, WA

Assets: \$11B

Branch Offices: 40



Founded in 1902, Washington Trust Bank is the oldest and largest privately held commercial bank in the Northwest U.S., with more than 40 financial centers and offices located in the states of Washington, Idaho, and Oregon.

In 1919, the E.H. Stanton family purchased the controlling interest in Washington Trust, starting a local family legacy.

Headquartered in Spokane, WA, the bank has more than 1,100 employees committed to serving their communities by understanding and meeting the financial needs of their customers.

Challenge

Washington Trust Bank desired a flexible automation solution that would allow it to reduce or eliminate the need for night staff and defer hiring additional IT staff to support its rapid growth and expansion.

Solution

To achieve these goals, Washington Trust implemented OpCon from SMA Technologies, a workload automation and orchestration solution that offers enterprise-level functionality and scalability, made simple.

Results

After deploying OpCon, Washington Trust Bank has:

- Automated numerous workloads within Windows and IBM i.
- Optimized the powerful capabilities of the Jack Henry SilverLake core processing system.
- Doubled its asset size without hiring additional Enterprise Information staff.
- Regained time to focus on higher-impact strategic projects.
- Implemented self-service functionality in one other department, freeing up staff time and resources.

Life Before OpCon

In 2013, Washington Trust Bank migrated to the Jack Henry SilverLake core banking system, a powerful data processing platform with deep capabilities. But Bank executives realized they needed to automate and integrate their systems more fully to unleash SilverLake's enormous potential to help them grow.

By 2015, the Bank was a rapidly growing financial institution of \$5 billion in assets. Like many successful organizations, it was facing some growing pains that hampered its ability to scale efficiently and economically.

Specifically, Washington Trust sought a flexible automation solution that would allow it to defer hiring additional IT staff to run overnight jobs and reports, while supporting the Bank's continued growth and expansion.

OpCon: The Right Choice

Members of Washington Trust's management team discovered the OpCon workload automation and orchestration solution at an industry conference and came away impressed with its capabilities, especially its ability to amplify the power of SilverLake.

Banks that connect their SilverLake core with OpCon via SMA's dedicated IBM i agent are able to automate and orchestrate workflows involving their business-critical applications, data, and processes. With increased visibility into and control of workflows, OpCon enables organizations to easily scale automation as their business grows.

OpCon allows financial institutions to automate critical processes within and outside the core to eliminate human error. It enables the transmission of files among third-party vendors, SilverLake, and the local environment.

Moreover, OpCon puts control in the hands of non-IT departments through its proprietary self-service buttons, freeing up IT resources to focus on higher-level projects and strategic initiatives. Banks can also fully automate their disaster recovery and business continuity processes, reducing the chance of costly system downtime during a critical incident.

"[Jack Henry] chose SMA Technologies as our solution provider because their OpCon software had a very strong track record for speed and reliability," says Brad Lane, Senior Director of Data Center Ops at Jack Henry.

Results That Support Rapid Growth

Since implementing OpCon in its operations in 2015, Washington Trust Bank has grown significantly—more than doubling its asset size from \$5 billion to \$11 billion. Yet OpCon has effectively supported this growth and additional complexity without requiring the hiring of additional Enterprise Information staff.



“OpCon has allowed us to not hire an FTE for the past 8 or 9 years,” says Meg Marker, Director of Enterprise Information Systems at Washington Trust Bank. “We were able to move a night operations person to days, and OpCon handled automating Windows and IBM i in conjunction versus other platforms.”



Washington Trust has automated numerous processes and workflows through OpCon, including account reconciliation (ARP) and ACH file transfers and processing, end-of-day processing, memo posts, and the generation of Loomis transaction files used to create data for currency transaction reports (CTRs), when required.

OpCon has also enabled Washington Trust to automate several other critical file movements, including file transfers between the business digital banking system, ChexSystems, and ICS Intrafi/CDARS; the delivery of notices and statements to the Bank’s third-party statement processor; Workfront G/L entries; and NSF processing.



OpCon has also given time back to existing staff, enabling them to focus on higher-level, more strategic initiatives to help move the Bank forward.



OpCon allows us to work on projects, versus managing files and jobs.”

Meg Marker, Director of Enterprise Information Systems
at Washington Trust Bank

Via OpCon’s unique Self-Service feature, the team that processes Canadian rate changes can now automatically update rates at 6:30 am, without any IT staff support. OpCon’s Self-Service feature allows us to have our staff start later in the morning,” Marker says. “With OpCon automation, we were able to have another team use the Self-Service feature a few hours earlier in the day.”

“We really appreciate the functionality OpCon offers and are grateful for the automation and scheduling the application provides.”