

Synchronizing the Branch Network:

How One Bank Turned Complexity into Strategic Advantage



For financial institutions with extensive branch networks, executing consistent, effective, and localized marketing campaigns is a daunting challenge.

Without accurate, consolidated data on physical environments and fixture locations, efforts to optimize messaging often lead to overspending, delays, and missed opportunities. In 2017, one of the largest U.S. banks by branch count partnered with our team to address this exact issue. We developed and launched a custom-built, data-rich asset management platform tailored to the needs of more than 4,300 branch locations. **The result: faster installations, lower costs, localized campaigns, and significantly improved compliance.**

The Challenge

After decades of mergers and acquisitions, the bank's national branch network featured widely varying designs, marketing zones, and fixture placements. As a result, Marketing and Merchandising teams struggled to:

- o Accurately visualize or compare branch layouts
- o Confidently deploy targeted messaging
- o Ensure and verify installation compliance across all locations
- o Tune campaigns based on local demographics or business goals
- o Optimize messaging for both static and digital marketing screens
- o Produce assets in a cost-effective manner

A streamlined communication and execution strategy was impossible without first solving the data visibility problem.

The Solution

We developed a custom asset management platform powered by detailed site scans, vendor data feeds, and proprietary algorithms—all delivered within a secure, cloud-based environment. This system became a single source of truth for branch-specific data.

Key components include:

Comprehensive site scans of 4,300 branches, resulting in:

- o 4M+ unique data attributes managed
- o 10,000 AutoCAD and schematic plans
- o 4,800 unique branch profiles

Fixture-specific message mapping using a proprietary algorithm aligning marketing content to real-world fixtures in every branch:

Merchandising and marketing catalog enabling 10,000 branch managers to access profiles, order items, and request support.

Confidential vendor update process allowing changes to be securely submitted, scrubbed, and reflected in the platform.

Security assurance met or exceeded all bank-level security standards - delivering confidence in both infrastructure and data handling.

-The InsightLens team, now operating as a division of Envision USA-

Internal Partner Benefits

Our partnership extended beyond Marketing, modernizing how the bank's Merchandising and Store Design teams manage branch refreshes and renovations. Budgeting, timing, and execution now rely on high-quality data, resulting in substantial cost savings and enhanced vendor coordination.

- o 450+ branch updates now planned and reviewed virtually each year
- o Rollout conflicts and delays dramatically reduced
- o Vendor activities sequenced and tracked within the platform
- o Real-time updates are documented by direct vendor submissions

Success Story: Rapid COVID Response

In March 2020, the onset of COVID-19 required immediate installation of protective shields in branches. Within 24 hours, our database provided a precise branch-by-branch breakdown of shield requirements across 4,000 locations. By identifying locations with existing barriers, we avoided material overuse and secured a rapidly diminishing supply. Over 35,000 shields were produced and installed across the network within six weeks—safeguarding staff and customers during a critical period. The database enabled a rapid, efficient response to an urgent call for action.

On-Going Wins

Each new marketing campaign now benefits from:

- Accurate, fixture-level message targeting
- Localized content tailored to branch demographics and goals
- Reduced overprinting and improved message compliance
- Creative capacity was liberated to focus on high-impact zones (e.g., windows and unused wall spaces)

Enhancement Opportunities

To keep pace with evolving expectations and increasingly tech-savvy consumers, we continue to enhance platform capabilities:

- Simple, automated proof-of-completion workflows
- Interactive floorplans providing visual merchandising prioritizing and placement guidance to branch staff
- Self-serve, criteria-driven dashboards and reporting for corporate teams—covering everything from customer demographics to window sizing

Conclusion

Through visionary collaboration, we redefined how one of America's largest banks executes branch marketing. What began as a data access problem evolved into a full-scale transformation of branch marketing—making execution more precise, messaging more personal, and operations more agile.

If your corporation is facing similar challenges, this proven, scalable, and secure solution is ready to deliver results.

www.insightlens.com

4M+

Data points managed across
4,300 branches

150,000

Collateral Installation Guides
distributed

35,000

COVID shields produced and
installed in 6 weeks

10,000

Unique tickets resolved
annually

450

Branch updates coordinated
each year

80%

Reduced marketing campaign
execution time

0

Failed security audits since
2020 commissioning