

# Heritage Bank: Build a digital platform for the future



Heritage Bank transforms into a digitally-led mutual bank through a "People First" philosophy

## Business challenges

To fulfill its "People First" philosophy and realize its mission to deliver a great customer experience every time, Heritage Bank required a complete digital transformation. Starting with a maturity analysis, the bank began replacing all core systems with new digital capabilities, including internet, mobile banking and loan origination systems. In order to move from manual to automated processes, Heritage Bank's systems needed to be streamlined with technology initiatives that included:

- Bimodal IT operating model
- Microservices and containers
- Customer engagement and payments platform
- Fintech strategy
- Document management

## Gartner solution

Gartner experts provided technology insight, best practice research, toolkits and strategic support to guide platform and application portfolio decisions. Bank staff attended Gartner conferences and brought back relevant knowledge to their teams. The Gartner for Technical Professional subscription helped with key operational decisions. Managing customer identity and streamlining security processes enabled the bank to make the right decisions and stay safe, yet flexible and agile, throughout the initiative.

## Business impact

Gartner expertise supported Heritage Bank's development of an IT strategy aligned to the corporate strategy. The bank will continue investment in IT improvements to meet the demands of digital business growth. Future efforts include work on product origination for customers, identity management, workflow capabilities and fine-tuning branch systems — with the continued goal of creating one seamless platform for customers.

For further information, visit [gartner.com](https://www.gartner.com).

**"Heritage Bank looks to maintain its values as it embraces new technologies by transforming from a traditional physical bank with a digital presence to a digital bank with a physical presence."**

Wayne Marchant, Chief Information Officer,  
Heritage Bank

## Snapshot

### Challenge

- Revamp IT and build an advanced digital platform
- Create a culture that would enable innovation

### Solution

- Aligned the right technologies to strategic priorities
- Gartner for Technical Professionals subscription guided key operational decisions
- Expert guidance for application portfolio decisions

### Impact

- Enhanced credibility of all digital initiatives across the business, leading to operational excellence that directly impacted service delivery
- Attracted and grew new customers while maintaining existing relationships
- Complete transformation into a digital bank with a physical presence

### How Gartner delivered value

- Benchmarking and maturity assessments
- Peer best practices
- Insight into creating a plug-and-play environment
- Enterprise architecture frameworks and assessments