

TANDBERG CUSTOMER PROFILE

Vineyard Bank



TANDBERG HELPS VINEYARD BANK ACCELERATE EXPANSION EFFORTS ACROSS INLAND EMPIRE REGION

THE CHALLENGE

Vineyard Bank is one of California's fastest-growing financial institutions, having expanded in just the last four years from \$210 million in assets to over a \$1 billion in assets and to more than 250 employees across the Inland Empire, Orange County and Los Angeles regions. As Vineyard began to expand, the management team experienced "new" and different growing pains as the distances between branches increased. Employees were being brought on weekly and new client business necessitated increased communications between bank executives, staff, financial analysts, and of course, the customers.

Vineyard CEO Norman Morales knew he needed to leverage technology to provide better overall internal and external communications. Increasing productivity and team collaboration were top on the list of benefits he hoped to achieve. He was looking for that technology "edge" to enable he and his executive staff to deliver top-quality services, manage the expansion and stay personally connected to his staff and customers.

THE SOLUTION

Morales' vision was the deployment of a video conferencing solution that would support the goals of his growing financial enterprise. For that, he looked to his Chief Information Officer, Bob Dieter. "An IP-based visual communication solution plan was devised in a staged approach — starting with a robust, tested network with adequate bandwidth," explains Dieter.

During the equipment selection process, Dieter introduced the Vineyard team to TANDBERG. The team immediately recognized the potential and the advantages that the TANDBERG solutions could deliver for the bank's vision. "TANDBERG delivered a total solution, not a "heath kit" approach. We immediately recognized how TANDBERG, as a partner, would make Vineyard's technology vision successful over the long-term. Our team's reaction was so positive, I had the TANDBERG representative begin developing our solution immediately," says Dieter.

"TANBERG visual communications keeps us highly productive and efficient. For example, when our Chief Risk Manager and I needed to resolve some issues, I just dialed him up on our T1000 units, and in just five minutes we had a spirited exchange of ideas and opinions, resolved the issue and had time for a quick chat. No need for time-consuming meetings or email exchanges. It's ideal for the way we work."

BOB DIETER
VINEYARD BANK
CHIEF INFORMATION OFFICER

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VINEYARD'S TANDBERG SOLUTION INCLUDED:

- **TANDBERG T1000 desktop units for executive team members**
- **TANDBERG 7000, 8000 and Director Series for the various branch offices**
- **TANDBERG 16+16 MCU for hosting multipoint conferences**
- **TANDBERG Management Suite, enabling Vineyard to manage all their TANDBERG systems and allow users to schedule calls through seamless integration with Microsoft Outlook**

Today, as Vineyard grows to include many geographically dispersed locations across the Inland Empire region, Orange County and Los Angeles County, to the San Diego coastal area, the bank relies upon their TANDBERG visual communication solution to coordinate physical office moves, keep staff in touch through regular and ad-hoc internal meetings and for meetings with outside partners and service providers.

"It can take hours to get between branches," says Dieter. "Meetings that could easily have taken the better part of a day are now accomplished within hours. We can make decisions more quickly, collaborate and share information (presentations, graphics, spreadsheets), and be far more productive. In addition, our TANDBERG visual communication solution enables Mr. Morales to stay in close personal contact with the staff, as we grow. It's a key tactical portion of our communications strategy."

THE RESULTS

What started out as a way to eliminate the excessive drive times between Vineyard's growing branch network has evolved into a platform that is beginning to permeate all communication aspects within Vineyard.

A good example is how Vineyard's Human Resources Department has integrated visual communication into their new hire training process. "We have new employees coming on board weekly," says Dieter. "The Training Department uses TANDBERG video conferencing to perform the New Employee Orientation (NEO). In addition to our slide shows and PowerPoint presentations, we get at least one senior level executive to greet the new hires personally, so that employees can ask questions, put faces to names and create more personal connections."

The approach overcomes the hurdles of getting new employees up to speed and conversant with both the key people and the processes of an organization, as well as keeping all employees current on new products and dynamically shifting market strategies. "This reinforces our commitment to implementing and using technology to its maximum capability, putting these tools to work immediately so we can all perform our jobs at peak." explains Dieter.

In addition to the Human Resources team, other key functional areas adopting TANDBERG solutions include:

- **Executive Communications** — Mr. Morales uses TANDBERG systems to connect his direct reports in secure one-on-one discussions, as well as keeping the entire staff current through regular multicast broadcasts. Executives can conduct regular one-on-one and staff meetings no matter where their team may be based within Vineyard's footprint of locations.
- **Board Member Communications** — Vineyard has extended their visual communication link to have weekly Board Member updates over a secure video connection with some Board members.
- **Branch Staff updates** — Vineyard uses TANDBERG's technology for more frequent intra-company communications. Combining visual cues with regular communications enables the Vineyard team to share best practices between branches and continue to deliver a high level of customer service in a rapidly expanding environment.
- **Loan Officers** — Visual communication has enabled Vineyard's loan officers to realize increased productivity and effectively "shrink" the geographies they need to cover.

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TANDBERG WORLD HEADQUARTERS
Philip Pedersens vei 22
1366 Lysaker, Norway
Tel: +47 67 125 125
Fax: +47 67 125 234
Video: +47 67 117 777
E-mail: tandberg@tandberg.net

200 Park Avenue, Suite 2005
New York, NY U.S.A. 10166
Tel: +1 212 692 6500
Tel: +1 800 538 2884 (toll free in the U.S.)
Fax: +1 212 692 6501
Video: +1 212 692 6535
E-mail: tandberg@tandbergusa.com

www.tandberg.net

- IT Special Projects — Vineyard's IT staff uses the TANDBERG solution to communicate with each branch more effectively, introducing new technology and troubleshooting IT-related issues.
- Internal Compliance — The new fulltime Chief Risk Manager has used the TANDBERG visual communication solution to conduct regular compliance discussions and keep pace with Vineyard's expansion.

WHAT THE FUTURE HOLDS

Going forward, Vineyard plans to increase the use of visual communications to provide even greater strategic competitive advantage. This will help them make better, faster business decisions by creating stronger relationships with investment analysts and other business partners, and enabling more personal service to their customers.

"Our executives will be able to communicate visually from their home offices, our SBA lenders will have the systems in their offices, our CEO will be able to speak securely, face-to-face with stock analysts in New York — these are definitely in the plans," says Dieter.

A growing number of financial industry companies are turning to visual communication solutions. Dieter believes that a C-level initiative is key to successful implementations. "Every company is different," says Dieter. "You have to match your solution to your business objectives, get your network infrastructure in place and actively integrate visual communication into your business processes to get the most from your investment."

"Financial companies like ours will find visual communication solutions a smart and strategic advantage in handling the demands of expanding services, increased customer requirements and more rapid decision cycles in our dynamic industry" says Mr. Morales.