



## SUCCESS STORY

Cornerstone Bank

# Perfect Alignment

## How COCC's Client Success Team Powers Community Financial Institutions Through Strategic Innovation



- 11 Locations
- \$1.6 Million in Assets
- Spencer, MA

Cornerstone Bank was formed in 2017, and built on the foundation of two local, mutual banks joining together—SpencerBANK and Southbridge Savings Bank. Proudly serving and supporting customers and communities in Central Massachusetts since 1871 and 1848.

Imagine a partnership where every vision is perfectly realized, seamlessly aligned with advanced technology and comprehensive support—this is precisely the landscape today's community banks and credit unions navigate as digital transformation reshapes their sector. Faced with the dual pressures of escalating customer expectations and stringent regulatory demands, financial institutions find a crucial ally in COCC's Client Success Team. As a leader in fintech solutions, COCC excels through a partnership-driven approach that not only meets but exceeds the unique needs of financial institutions, empowering them with expert guidance and technological expertise to ensure transformative outcomes.

The effectiveness of COCC's Client Success Team is significantly bolstered by robust support teams within the company. These internal teams provide foundational support, enhancing the capabilities and responsiveness of the Client Advisors and Partners. Central to this framework is the Strategic Products Team, which offers a consultative, needs-based approach to match the right products and services with our clients' unique requirements. This ensures that each solution not only meets but also aligns with the clients' strategic objectives. This collaborative structure within COCC allows the Client Success Team to offer seamless technological integration and foster enduring partnerships that are both hands-on and tactically aligned with the clients' long-term objectives.

### Unprecedented Scale and Success

At COCC, Client Advisors and Partners are more than just points of contact; they are key advisors deeply embedded in the banking and fintech ecosystems, playing a pivotal role in how technology can be seamlessly integrated into existing systems while ensuring alignment with future growth.

Take, for example, the understanding of Cornerstone Bank, which continuously seeks new ways to strengthen their overall customer experience through robust and modern digital offerings. Through close collaboration with COCC's Teams, the bank's Client Advisor identified tailored solutions that not only addressed their immediate needs but also positioned them for long-term success by helping to connect them with the appropriate resources to discuss objectives, help review considerations and set proper expectations.

This hands-on approach resulted in the seamless integration of new technologies, enhancing the bank's customer experience and driving growth. The Client Success Team possesses a nuanced understanding of the challenges and opportunities within the financial sector, making them invaluable allies for banks and credit unions. At the core of their expertise, each Advisor and Partner excel in:

- **Strategic Guidance:** Working closely with clients to map out tactical initiatives that align with their long-term goals, ensuring that investments in technology and services translate into tangible benefits.
- **Introducing New Products and Services:** As fintech continues to evolve, Client Advisors provide guidance to clients in seeking cutting-edge solutions, sharing industry knowledge and working closely with the Strategic Products team to help them bring their vision to fruition. Leveraging COCC's API integrations team, they ensure seamless integration with existing systems, helping financial institutions stay ahead of industry trends and meet customer expectations.
- **Development Requests and Project Guidance:** Client Advisors and Partners also play a critical role in development projects, offering their expertise to ensure initiatives achieve the desired outcomes. Collaborating closely with COCC's Project Management team, they provide structured guidance and support throughout the project lifecycle, from planning to execution, ensuring timely and successful delivery of solutions.
- **Issue Escalation and Resolution:** When challenges arise, Client Advisors and Partners act as the linchpin in escalating and resolving these issues. Supported by COCC's various dedicated customer service teams, they ensure that clients' operations run smoothly with minimal disruption, providing timely and effective solutions to maintain optimal performance.
- **Fostering a True Partnership:** Beyond mere transactional relationships, COCC's Client Success Team strives to build a partnership based on trust, mutual respect, and shared objectives. This involves regular, open communication and a proactive approach to meeting clients' evolving needs.

## Maximizing Impact

This integrated approach offers COCC and its clients a significant and unique competitive advantage. Personalized support from the Team enables financial institutions to navigate the fintech space more effectively, leveraging new opportunities and addressing challenges proactively. The result is a more responsive, efficient, and customer-focused operation that can adapt to the rapid pace of change in the financial sector.

"The partnership with our Client Advisor has been integral in Cornerstone Bank's vision to move the Bank forward in this digital world." stated Todd M, Tallman, Chief Executive Officer of Cornerstone Bank "Our client success meetings have kept our multiple projects on schedule and has been instrumental in the successful implementation of several new technologies."

The role of each Client Advisor and Partner at COCC exemplifies the company's dedication to the success of its clients. In an industry characterized by constant innovation and regulatory shifts, the insightful guidance and support provided by this team are indispensable. Through their expertise and commitment, COCC's Client Success Advisors and Partners help financial institutions not just to survive but to thrive in the digital age, marking a new chapter in the fintech partnership narrative.

"At COCC, we're dedicated to steering our clients towards a successful future" states Michelle Orsini First Vice President, Client Success for COCC. "Through personalized support and modern, robust solutions, we're focused on forging deep relationships that allow us to understand and preemptively address the unique challenges our clients face."

In a world where technological advancements and customer expectations continue to evolve rapidly, the insights and hands-on support from seasoned professionals like COCC's Client Success Team are more critical than ever. Their role underscores the importance of collaboration, foresight, and tailored support in achieving mutual success in the dynamic fintech landscape.

## COCC

COCC, a recognized leader in delivering innovated comprehensive technology and partnerships, offers feature-rich, modern standards-based core and digital banking solutions, combining intuitive user experiences and APIs to streamline advanced fintech integrations. COCC clients leverage a complete suite of modern financial technology solutions. COCC has been client-owned for over 50 years, acting as a partner to clients with an unmatched focus on service to help community banks and credit unions meet their unique and ever-changing needs. To learn more, visit [www.cocc.com](http://www.cocc.com).