



Banking technology and equipment play a key role in separating your branch from the pack, while also creating the right branch experience for your customers or members. If done correctly, technology can differentiate your brand, improve customer engagement, reduce costs and increase efficiencies. If not executed properly, it can be more 'bleeding edge than leading edge,' or worse, make the branch experience even less inviting.

To help you get started on the right foot, here is a quick checklist of all the banking technology options, equipment, and objectives we see and recommend to banks and credit unions across the country. Use this as a starting point for identifying which initiatives might be right for your branch.

Financial Institution Name: _____ **Date:** _____

How many current branches does your financial institution currently have? _____

How many branches need new technology? _____

BANK TECHNOLOGY OBJECTIVES:

- | | |
|---|--|
| <input type="checkbox"/> Enable Customer Engagement | <input type="checkbox"/> Increase Cross Sell Opportunities |
| <input type="checkbox"/> Free In-Branch Employee Time | <input type="checkbox"/> Display Rates and Quotes |
| <input type="checkbox"/> Modern Aesthetic | <input type="checkbox"/> Act as an Advertising Tool |
| <input type="checkbox"/> Enable Open Concept | <input type="checkbox"/> Differentiate Brand |
| <input type="checkbox"/> Assist in New Brand Efforts | <input type="checkbox"/> Reach Customers in New and Different Ways |
| <input type="checkbox"/> Enable Communication | <input type="checkbox"/> Provide Customer/Members with a Better Branch Experience |
| <input type="checkbox"/> Reduce Paper Waste | <input type="checkbox"/> Provide Customer/Members with Additional Choices on How to Engage with the Branch |
| <input type="checkbox"/> Increase Product Education | |



BANK TECHNOLOGY OPTIONS:

DIGITAL SIGNAGE

- ☐ Dynamic Digital Signage Screens
- ☐ Interactive Touchscreen Displays/Kiosks
- ☐ Digital Community Board
- ☐ Integrated Applications/Modules
- ☐ Easy to Use Content Management System
- ☐ Expert Nearby – Virtual Face-to-Face Meetings through High Definition Video
- ☐ Tablets

CASH MACHINES

- ☐ ATM's – Standard
- ☐ ATM's – Deposit Image
- ☐ ATM's – Envelope Free
- ☐ Teller Cash Dispensers (TCD)
- ☐ Teller Cash Recyclers (TCR)
- ☐ Personal Teller Machines
- ☐ Assisted Self Service Machines

MISCELLANEOUS HARDWARE

- ☐ Teller Towers
- ☐ Instant Issuance Credit/Debit Cards
- ☐ Drive-Up Systems
- ☐ Installation Services
- ☐ Repair and Maintenance Services
- ☐ Safes
- ☐ Deposit Boxes
- ☐ Vaults

MISCELLANEOUS SOFTWARE SYSTEMS

- ☐ Remote Teller Software
- ☐ Customer Flow & Tracking Software
- ☐ Branch Security Systems
- ☐ Cash Flow Manager Software

With so many technology options, it's important to find the ones that match your unique plans and goals. Come see the latest banking technology and equipment in action at our [Ideation Center](#), a playground for bankers, and together we can identify your specific needs.