



Tom Carlisle
BLUEGRASS STATE BANK

A SOLOPRENEUR WITH EMPLOYEES

Age

45

Position

Chief Information Officer

Level of Tech Literacy

Advanced

Company Description

Bluegrass State Bank, a local financial institution based in Fayette County, is dedicated to providing exceptional banking experiences to our fellow Kentuckians. Founded in 1964, they're trying to upgrade their small-town image.

RETICENT | ACCOMODATING | VIGILANT

MOTIVATION

PROJECT (AND COMPANY) SUCCESS

Tom deals with technology issues on many levels – from individual support tickets all the way up to company-wide systems decisions. To him, every issue, no matter how small, is a project that must have a positive outcome. Any failure slows growth.

SECURITY, SECURITY, SECURITY

Any CIO knows a data breach can cost them their job, but there's even more pressure in the financial sector. Tom loses sleep over data security issues.

DO MORE WITH LESS

Tom knows there are solutions that can make work easier for him, his department, and the whole company. Automating tedious processes could make things more efficient for everyone.

BEHAVIORS

SATISFY EVERYONE

Tom is a people-pleaser. He spends a lot of time considering how to best serve the bank's management team, employees, and most importantly, customers. He's been known to offer long-time customers personal in-office tutorials about how to use online banking. His quest to personally ensure everyone's happiness often blows up

KEY FEATURES

WORKFLOW AND COLLABORATION

Users must be able to see and edit certain documents, while administrators must be able to establish rules for how documents flow through departments and exactly who sees what when.

his days and leaves him working late into the night.

QUIET INTELLIGENCE

When it comes to technology, Tom knows his stuff. He'll be able to judge fairly quickly if a software solution can adequately address his needs. His challenge lies in persuading less-technically minded stakeholders that the problems his department faces require innovative solutions.

GOALS

ENSURE KNOWLEDGE AND COMPLIANCE TO IMPROVE SECURITY

Bank employees range from recent high school grads working as tellers to the 72 year old senior management staffer who still wishes everything could be done on paper. Tom needs intelligent workplace services to shine a light on and control processes for his many employee groups. Reining in disparate (and outdated) processes closes a security gap while contributing to smoother inter-company and customer interactions.

KEEP UP WITH INCREASING SPEED OF WORK

Customers and employees of Bluegrass State Bank expect immediate information and solutions, even though some processes still begin with pen-and-paper forms. With cloud based document

management with document (and support ticket) automation, Tom's IT department can keep pace.

MONEY YELLS

Tom is a tech guy, of course, but he's in the financial industry. The cost of a solution (in time and money) must measurably add enough value to the information exchange and productivity of the company to result in cost savings or additional revenue. He needs to be able to explain to others in the C-suite how this solution will make or save the company money in the long haul.

I'm convinced that we need a solution. The right solution will be obvious enough to help me convince my banker colleagues.

INDEXING AND RETRIEVAL

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