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Solve It Stories

Tales of Customer Success from Our Partner:

atrium

How Atrium helped Dollar Bank set their bankers up for success

The challenge:

Dollar Bank is one of the largest mutual banks in the United States, with more than $12 billion in assets and over 170 years of history. They differentiate themself through high-touch customer service and strong personal relationships. As customer expectations evolved, Dollar Bank identified the need to transform their service and relationship management.

The opportunity:

Organizations often need to scale and modernize their operations without sacrificing personalized service as their competitive advantage.

How do they:

- Centralize customer interactions and relationship visibility while providing flexible managed-services support?
- Establish scalable foundations around process, governance, data structure, and security?
- Introduce a phased, agile delivery approach centered on continuous improvement and long-term adoption?
- Support future analytics, automation, and AI initiatives?

For Dollar Bank, the goal was clear: modernize service delivery without losing the relationship-driven experience at the bank's core.

"Atrium became an extension of our team throughout the transformation. There was trust, collaboration, and a shared focus on building something that truly worked for our bankers and our customers.

Heather Maples
VP, Salesforce Platform Owner

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The successful outcome:

Dollar Bank partnered with Atrium to successfully implement Agentforce Financial Services through a service-first transformation strategy. Atrium understood the operational realities of community banking and built a partnership based on close collaboration, transparency, and trust. Together, they went beyond technical implementation, continuously incorporating employee feedback and operational insights to establish scalable operating foundations and guide long-term roadmap decisions.

This has resulted in:

Improved experiences
for customers and employees

Reduced operational silos
across teams and channels

A scalable foundation
for future AI initiatives

Considerations for financial services customers looking to modernize customer experiences and business operations:

- Lead with service, not just technology. Focus first on how service is delivered across teams, channels, and customer touchpoints before designing the supporting technology architecture.
- Treat employee experience as a core transformation strategy. Organizations that involve their teams early, incorporate real-world feedback, and prioritize usability are significantly more likely to drive long-term adoption and customer experience improvements.
- Modernize operational foundations before scaling AI. Clean processes, connected data, governance, scalable architecture, and trusted workflows are critical to successfully deploying AI-enabled experiences that deliver measurable business value.

Learn more about Atrium.

Learn more