

Q2 Helps Johnson Financial Group Compete at a National Level by Modernizing its Digital Banking Experience

Key Challenges

Wisconsin-based privately-held financial services company Johnson Financial Group (“JFG”) is a \$14 billion financial services company providing the full spectrum of consumer and commercial financial services. From banking to wealth management and insurance, JFG provides financial services such as mortgages, retirement and financial planning, leasing, commercial lending, business and personal insurance, and much more.

For JFG, having a first-class digital experience was paramount. Its Chief Technology Officer Brent Maher says, “From a digital perspective, we had a bit of a dated experience, particularly for our banking customers, and Q2 brings something that allows us to compete at a national level against national scale banks.”

Katie Heim, JFG’s senior vice president and director of bank product solutions, agreed. “The challenge was being able to provide one comprehensive view of the full financial picture. We also needed to make sure that we’re staying relevant, not just for the short term, but for the long term.”



About Johnson Financial Group

Founded: 1970

Headquarters: Racine, Wisconsin

Current market: : Wisconsin and Minnesota

Assets: \$14 billion under administration

“**Client needs on the consumer side are different from client needs on the commercial side. The Q2 digital banking platform allows us to build and tailor those solutions to those unique client needs .**”

Katie Heim

Senior vice president and director of bank product solutions, Johnson Financial Group

Results

JFG customers get instant access to multiple accounts – consumer and commercial - with a streamlined digital experience.

Rave user reviews. Not only is JFG getting high ratings in the app stores, JFG has had a significant reduction of inbound customer calls and requests.

Flexible, adaptable dashboards. JFG can easily segment and individualize the customer experience to match the line of business the customer is viewing and adapt for more sophistication in the wealth space, while amplifying more robust capacities in the commercial banking space.

JFG's face-to-face service extended through digital. Q2 enables JFG to continue to deliver the human aspect of its business through digital channels.

Solutions

Switching to the Q2 digital banking platform and leveraging Q2 Innovation Studio has enabled JFG to quickly develop and integrate new workflows, new products and third-party applications. JFG hired Q2's partner, Tailwind, to help implement JFG's strategy, essentially acting as JFG's in-house development staff using the Q2 Innovation Studio's SDK (Software Development Kit).

"Q2 allows us to partner with Tailwind to really create an optimized digital banking model that lets us meet clients exactly where they are," Heim says. "Clients have high demands, especially after the pandemic, in terms of what the experience should be and what they want it to feel like. Q2 and Tailwind have been fabulous partners, working with us to customize that experience by segment."

Multiple business lines, one easy log-in.

"Q2 Innovation Studio allows us to take what would traditionally be just a digital banking solution and extend it across the rest of our total financial services strategy", Maher says. "So, the value in our partnership with Q2 and use of the Q2 digital banking platform is really about providing our customers with a single point of entry, not only into digital banking but into their total financial picture, which includes banking, wealth and insurance."

Rave reviews.

Andrew Tull, Tailwind Business Ventures Founding Partner, says, "One of the easiest ways to measure success in the Apple or Google stores, is to look at how many stars a particular app may have. There are a number of financial institutions that are not very favorably received, but Johnson Financial Group has ensured its ratings are where they need to be."

Flexible, adaptable customer dashboards.

Heim appreciates JFG's newfound ability to individualize the digital experience to match customer expectations. "Whether I'm looking for a tailored, personalized experience in the

consumer space, a sophisticated look and feel in the wealth space, or that robust capability in the commercial banking space, Q2 enables it. We can basically tailor by segment, regardless of how the client is utilizing the experience, whether it's for them personally or for their business with the robust capabilities they need. The fact that we're able to tailor that unique solution for the client is really something that stands out and provides us with that competitive edge in the market."

Extending the JFG brand through digital.

Heim points out that Q2 Innovation Studio lets JFG deliver its unique, authentic brand through digital. "Q2 is really helping us bridge technology and that human aspect of our business. So, we're working together to humanize the digital experience as much as we possibly can so the relationship we're providing face-to-face is also coming through in that digital banking experience."

Maher and the JFG team have been pleased with their digital transformation. "What Q2 brings to a community bank like us is we can provide what I would consider nationally competitive digital banking capabilities."

For more information go to [Q2.com](https://www.Q2.com) or call (833) 444-3469.