

Securing Client Data and Streamlining Workflows: How SmartVault Delivers for BayFirst Financial

BayFirst Financial | Tampa Bay, Florida

BayFirst Financial in Tampa Bay, Florida, is a forward-thinking bank that provides personalized service balanced with innovative digital tools that improve customer and employee experiences.

The bank's Process Analyst, Alex Fernandes, is critical to delivering that commitment. While reviewing workflows, Alex realized they needed to improve how BayFirst manages, stores, requests, and shares documents with its staff and customers.

"Employees and customers sent emails back and forth," he explained. "It was an outdated process that was clunky and risky. We needed something more secure and user-friendly."

After an extensive review of solutions, the bank selected SmartVault — a cloud-based document management and client portal platform — thanks to its security certifications, user-friendly client portals, powerful integrations, and customer support availability.

Simplifying Account Opening and Management

Employees, like branch managers, assistant managers, bankers, and back office, find SmartVault especially valuable when opening new accounts and maintaining existing customers – a process that's now digital and more efficient.

"We used to save the documents on our local server and manually send them to our customers individually," Alex explained. This process was not the most secure way and slowed teams down, leaving new customers waiting longer than necessary to open their accounts.

"We can now save the documents in SmartVault and automatically send them to the customers," Alex shared. "When time is of the essence, we value being able to process documentation and get it to the customer quicker and securely. We also receive a faster response from the customer than when everything went through email."

BayFirst also leverages SmartVault eSignature to streamline how customers review and digitally sign documents.

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Alex Fernandes, Process Analyst

Instead of collaborating in disorganized email threads, customers can access SmartVault's client portal – which BayFirst customized to their brand – from wherever they're located and on any device with an Internet connection. This lets customers securely share, review, and eSign documents, wherever and whenever, to keep the transaction moving forward.

Another perk? SmartVault keeps each customer's files in a private, digital vault, so employees across teams and departments know exactly where to go to find a specific customer's information.

Centralizing Back Office Data and Fostering Collaboration

“Our back office manages a lot of legal documentation between law offices, judgments, summons, and more,” Alex started. Before SmartVault, the bank would create zip drives and mail them to the appropriate agency. “We don't have to do that anymore with SmartVault.”

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Legal and risk management teams can now collaborate more easily with complete visibility while restricting external access as needed.

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Transforming Outdated, Insecure Processes with SmartVault

For any financial institution seeking to transform legacy processes, boost security, and enable employees to provide excellent customer experiences, SmartVault delivers a purpose-built solution. As Alex put it: “We evaluated many solutions, and I found SmartVault is the best one.”

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