

"OUR INVESTMENT IN  
HARTMAN HAS BEEN  
EXTREMELY WORTHWHILE  
AND HAS POSITIONED OUR  
BANK FOR FUTURE GROWTH."

KEVIN BENSON  
PRESIDENT & CEO

# CASE STUDY: ROSEDALE FEDERAL SAVINGS & LOAN ASSOCIATION

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HOW UNDERGOING DIGITAL  
TRANSFORMATION POST-MERGER  
HELPED THE BANK MEET BUSINESS  
GOALS AND ATTRACT YOUNGER  
CUSTOMERS



# SUMMARY

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With nine branches across three counties in Maryland, Rosedale is a well-known community bank that serves both personal and small business customers and specializes in mortgage lending.

Rosedale leadership initially engaged Hartman to help with technology integration planning and execution related to a merger with another community bank. Hartman led the integration efforts and seamlessly guided the bank through the acquisition.

During the initial engagement, Hartman determined that the bank needed to better integrate technology with their overall business goals and work toward digital transformation – a task best handled by a Chief Information Officer (CIO). Though Rosedale had a strong IT manager with great potential to succeed, he needed mentorship and a defined career path to be the strategic IT leader the bank needed for long-term success.

# CHALLENGES

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Like many other community banks, Rosedale struggled to keep up with large, national banks and differentiate themselves in an everchanging digital environment. Their customer base skewed older with more traditional banking needs, but to sustain growth and relevance with younger generations, Rosedale needed to evolve their operations with a pointed focus on technology and digital strategy. In an attempt to keep up, leadership had launched several one-off technology solutions to augment their services and capabilities over the years, but without a comprehensive strategy, the solutions did not propel business any further or reach younger potential customers in a significant way.

**“With Hartman as part of our team, I have the confidence to make decisions involving not only technology, but business strategy.”**

**Kevin Benson, President & CEO  
Rosedale Federal Savings & Loan Association**



# THE SOLUTION

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After working closely with Rosedale during the integration, Hartman identified an opportunity for the bank to expand their leadership by adding a Chief Information Officer (CIO) to their executive team. This role would be critical in digital transformation efforts aimed at meeting the needs of a younger demographic. Hartman detailed a strategic technology roadmap that focused on coaching the existing IT manager into a business-focused and method-driven CIO. Hartman mentored the IT manager, documenting progress along the way, and after a year and a half, recommended his transition into the new role.

## RESULTS/ROI

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As a result of Hartman's coaching, Rosedale now has a CIO on the leadership team who knows the business from the inside out. With a CIO as part of the executive team and a solid strategic technology plan, the bank is set up to make stronger decisions related to technology. Rosedale's IT strategic plan is tightly aligned with their business strategic plan, which is key to enabling the bank to meet their digital transformation goals and attract and retain younger, technology-savvy customers.

**“The leadership and guidance helped us elevate IT to a strategic level within our institution, starting us down the path to digital transformation and setting us up for success that is scalable and measurable.”**

**Kevin Benson, President & CEO  
Rosedale Federal Savings & Loan  
Association**