

SP Policy Manager at Hanmi Bank

As Hanmi Bank expanded its footprint across the U.S., its compliance team saw an opportunity—not a problem. With Microsoft (Office) 365 already in place, they set out to strengthen policy governance and simplify employee acknowledgment processes using tools their teams already knew. Partnering with SP Marketplace, they implemented SP Policy Manager to bring structure, automation, and visibility to their policy lifecycle—without adding complexity or leaving their trusted Microsoft environment.

At a glance

Company: Hanmi Bank

Challenge: Headquartered in Los Angeles, California, Hanmi Bank is a trusted financial institution serving multi-ethnic communities through 30+ branches and loan production offices across nine states. As the organization continued to grow, the compliance team identified an opportunity to enhance policy governance and streamline employee acknowledgment processes using their existing Microsoft (Office) 365 infrastructure.

Suggested Application: SP Policy Manager

Outcome: Seamless Integration, Maximum Adoption

THE CHALLENGE



With an expanding national footprint and a reputation for dependable service, Hanmi Bank was committed to strengthening internal processes that supported compliance and transparency. The bank's leadership recognized the importance of ensuring employees had consistent access to up-to-date policies and procedures—especially in a regulatory environment that demands precision and accountability.

Although Microsoft (Office) 365 was already in place across the organization, policy creation and tracking were being handled through manual methods. The team sought a more structured, automated approach that would work natively within their existing platform, offering both control and scalability while allowing for customization by internal business users.



VP of IT at Hanmi Bank



"We wanted something that felt like it belonged in our Microsoft 365 environment—and SP Policy Manager delivered. From day one, it integrated smoothly with our systems, helped us centralize policy access, and gave us a way to track compliance with zero disruption to our staff. It's powerful, intuitive, and completely aligned with how we work. We didn't just solve a compliance challenge—we maximized our technology investment."

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THE SOLUTION

Hanmi Bank was clear on its vision: enhance policy management without stepping outside the Microsoft (Office) 365 environment. SP Marketplace stepped in with the ideal solution.

After understanding the bank's operational goals and compliance needs, SP Marketplace deployed its SP Policy Manager application—an out-of-the-box solution built on SharePoint and the Microsoft (Office) 365 Platform-as-a-Service. It provided Hanmi with a centralized, intuitive portal where employees could easily access, review, and acknowledge policies, all within the systems they already used daily.

What started as a need for improved oversight evolved into a holistic policy management platform. Automated workflows now streamline approvals and acknowledgments, while Power BI dashboards give real-time insights into compliance. The application's no-code framework also means Hanmi's internal teams can evolve and scale the solution as needed—without outside development.

With SP Policy Manager, Hanmi Bank successfully strengthened its policy governance while making the most of its Microsoft (Office) 365 investment—delivering a solution that is secure, scalable, and tailored to its unique business environment.

SP Policy Manager

A pre-built solution on Microsoft (Office) 365.

SP Policy Manager is a no-code, out-of-the-box business application built on Microsoft (Office) 365 using SharePoint, Power Automate, Teams, and Power BI. It simplifies the entire policy lifecycle—drafting, approvals, publishing, and acknowledgments—while operating natively in your existing Microsoft environment.

Key Benefits:

- **Centralized Control:** Manage all policy documents and procedures from one consistent platform with secure, role-based access.
- **Automated Compliance:** Use built-in workflows to streamline policy approvals and employee acknowledgments.
- **Real-Time Insights:** Track who has viewed or acknowledged policies using built-in Power BI reporting.
- **Customizable & Scalable:** Configure approval chains, expiration dates, and notification workflows to fit your business—without writing a single line of code.
- **Microsoft Native:** Built directly on your Microsoft 365 tenant for maximum security, user adoption, and governance.

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