

## CUSTOMER SUCCESS STORY

# PYRAMAX BANK

## CRM Software for the Banking Industry

### PYRAMAX BANK

- Cost effective CRM solution
- Quick and easy implementation
- Cloud implementation provides user flexibility
- Time saving features including automation improve user productivity



Located in Greenfield Wisconsin, PyraMax Bank F.S.B offers the advantages of a local community bank coupled with the financial power of a larger financial institution. The Bank has over \$486 million in assets and eight convenient locations located throughout southeastern Wisconsin.

Founded in 1895 under the name South Milwaukee Savings Bank, PyraMax Bank has seen many changes throughout its time. Whether through its name, (which in a 2000 merger formed PyraMax Bank), and even with the type of software needed to maintain daily banking operations, PyraMax Bank has always searched for ways to improve and progress over time.

We spoke with Andrew Freter, Assistant Vice President Commercial Relationship Manager at PyraMax Bank, about the company's experience using OnContact CRM, which was implemented in the cloud.

PyraMax Bank began looking for a new CRM software system one year ago when they wanted to increase management involvement within specific departments and aspects of their business as well as keep better track of customers.

**"OnContact CRM is a very cost effective, very easy system for us to implement."**

**Andrew Freter,**  
**AVP Commerical Relationship Manager**

"We were looking for a product that would increase our optics on what our sales team is doing, help us manage our pipeline, help us manage our prospect and customer interactions and automate some of our reporting."

Instead of importing information into spreadsheets, PyraMax Bank was on the hunt for a CRM system that could make the transfer of information from employees to managers easier and with greater accuracy.

"Our management teams and board of directors want to see reports on an ongoing basis on what kind of customers

and prospects we're working with, what's the dollar amount of the opportunity and when we can expect to have them on board. Instead of filling things out in an excel spreadsheet, it really allowed our sales team to put everything in one place so it can be pulled and shared with our management and board of directors and so that we weren't all tracking our own spreadsheets."

Transparency and creating a central hub for all PyraMax's most needed information was a top priority in their search for the ideal CRM software.

When searching for a new CRM system, PyraMax wanted a user-friendly software that wasn't overly engineered. Having used a previous version of OnContact CRM in the past, PyraMax made the decision to go with WorkWise. However, simply knowing WorkWise team members wasn't the only reason why. It also came down to affordability, ease of use and quick and easy implementation.

"OnContact CRM is a very cost effective, very easy system for us to implement. There wasn't a ton of capital expenditure. With WorkWise, it was easy for us to get going."

Freter describes the implementation process as a "smooth" one. PyraMax Bank customized fields and completed a data migration (importing all of their customer information into the new system) with the help of WorkWise's CRM specialists.

The fast implementation was impressive to PyraMax, with Freter stating, "We like that it wasn't a long and drawn out process. We knew that if we could get up and running fast, that was one less day, week, month of manual reporting. The timeline was great and allowed us enough time to continue to run our business."

Implementing the software in the cloud was a decision based on creating convenience for all of its users and PyraMax's IT department. Freter sees many benefits in this form of CRM software.

"It's web based. Our IT department didn't have to



worry about server space. Our staff can access it from anywhere. Our sales staff have iPhones and Androids, we can access it no matter where we are. It's super easy to get the information when you need the information."

After the implementation, using OnContact CRM has allowed PyraMax Bank the ability to gain more insights

into their customer base, specifically the prospects whose business they do not gain.

"We have some great reporting. Sometimes we're working with bringing a customer in and ultimately we don't end up winning their business and it gives us some great optics on the reasons why we didn't win their business and what we can do as a bank to better ourselves so that we can serve more people.

An additional benefit of utilizing CRM software is creating clear boundaries for sales reps when it comes to contacting potential customers.

"It keeps sales people from stepping on each other's toes. When you start talking to somebody, you load them in

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as a prospect or a lead and if somebody else is thinking about prospecting them, they can see that someone else is already working on them."

For PyraMax Bank, one of the major benefits of using CRM has been the increased amount of company organization, time saving features like automation and having CRM act as a central hub for up to date, accurate company reports and data.

"It has definitely saved time and increased productivity. The big thing for us sales people and commercial bankers is that we don't have to spend two hours every Friday filling out a report of the prospects we're working on, it's just automated. When our Chief Lending Officer needs that report for management, he can just pull it. It's all there in one place, with live data."

WorkWise provides resources for all of its software users, including user group meetings and free webinars. Freter mentioned the "ongoing education" that WorkWise provides and how as a customer it has been insightful to meet other WorkWise software users.

"I was just at a (WorkWise) user group meeting. Being in a meeting with other people who use the products, learning their best practices, just enriches the experience. From start to present, it's been a really good experience."

Overall, PyraMax Bank's experience with WorkWise has been a positive one, with special thanks to the CRM sales reps and training specialists.

"The sales team was extremely knowledgeable. They listened to what we wanted to get out of CRM and they helped us find a way to get it done. They (sales reps) were extremely patient, listened to our concerns, and responded quickly."