

# HELLO

**CRM & Dealer Management**

**July 2024**

**WIPFLI**

# Overview

Introduction

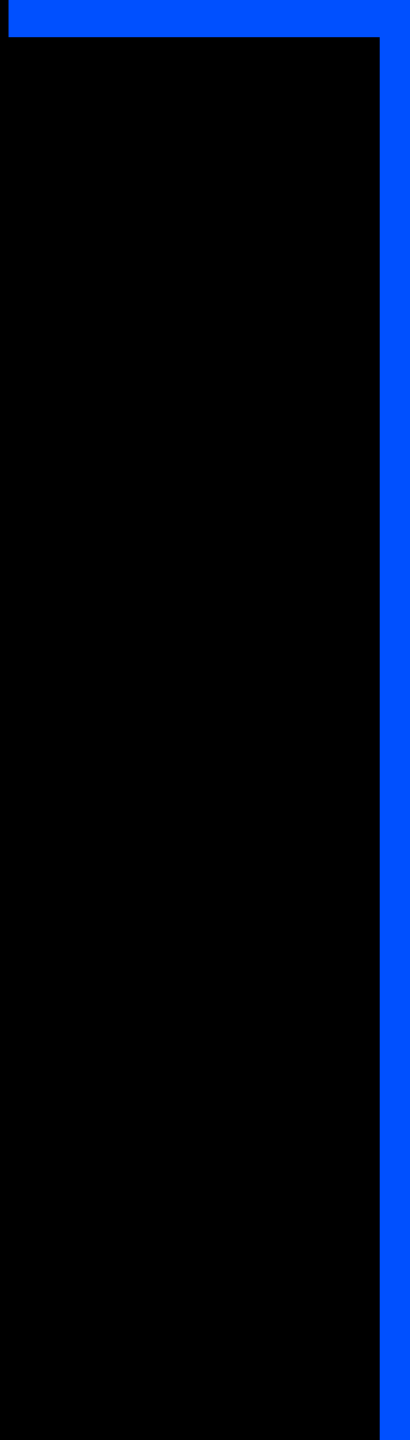
**01**

Panel Discussion and Demo

**02**

Q & A

**03**



**Introduction**

# INTRODUCTIONS



**Sara Circosta**  
WIPFLI  
Financial Services  
Digital Growth Leader



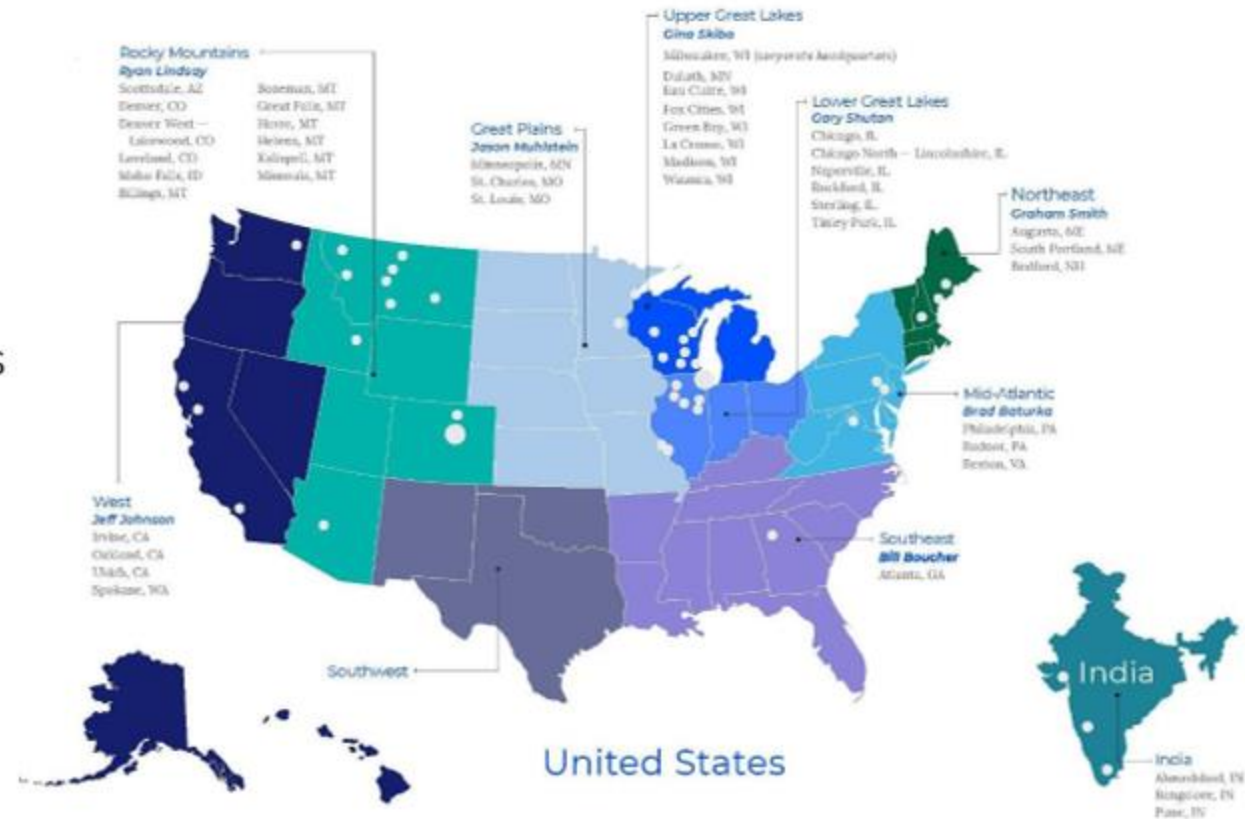
**Gerald Pennington**  
VP Indirect Lending  
Rally Credit Union



**Robin Early**  
WIPFLI  
Financial Services &  
Salesforce SME

## Industry expertise

- A top 20 national accounting and consulting firm
- Financial Services is a key practice area -We serve 1000s of FS clients
- Our focus includes Banks, CUs, Wealth Management, and Insurance



# What we do

## Tax and audit

We go beyond numbers to deliver strategy and tactics to mitigate liabilities and meet compliance regulations.

## Compliance and risk

Our team proactively manages compliance and risk across your organization.

## Outsourcing

Optimize your day-to-day operations when our team handles your accounting, controller, payroll, technology and cybersecurity needs.

## Digital Transformation

From strategy and custom software solutions to data, analytics, ERPs, CRMs, we help you connect, transform and grow.

## People and talent

Navigate people-centered change and optimize talent with the right team, rewards and roles.

## Business transition

Be confident in your future with support in transition, succession planning, M&A and valuations.

## Strategy & optimization

Build the organization you envision with a compelling vision, operational excellence and tech optimization.

## Organizational development

Build the team you need to lead today and tomorrow to scale your growth and increase your value.

**WIPFLI**

# Wipfli Digital supports your **digital evolution** at every step along the journey.

## Digital Strategy

Research | Customer Journey | Design Alignment | Digital Roadmap

## Enterprise Solutions

CRM | Marketing Automation | ERP | DCS | iPaaS

## Cyber Security

Threat Assessment | Data Recovery | Managed Security | Cloud | Compliance

## Custom Software & Apps

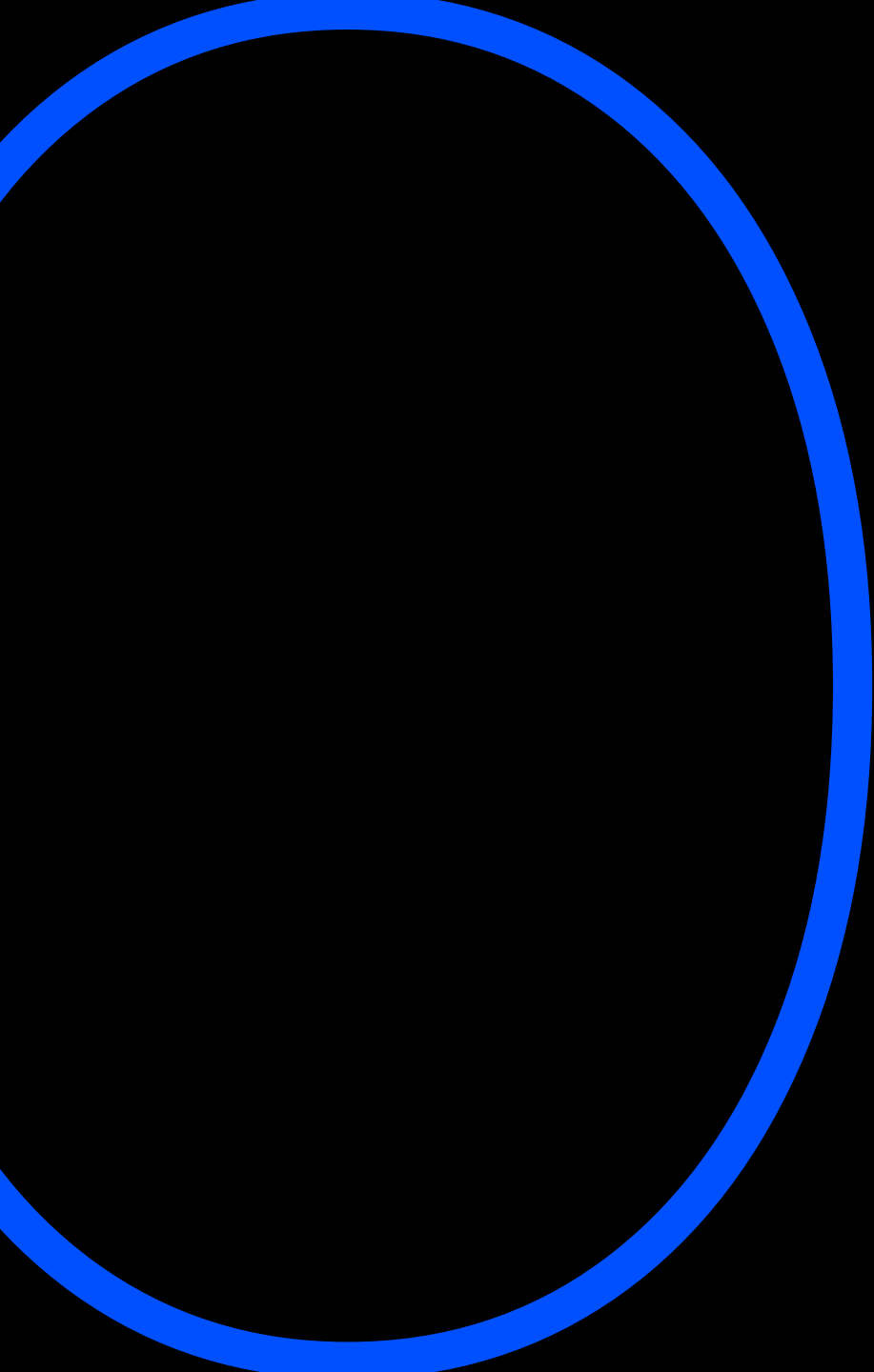
iOS & Android Apps | Responsive Web | Portals

## Data & Analytics

CDP | Automation & Visualization | ML & AI | Warehouse | Governance | Data Strategy

## Managed Services

24/7 Support Desk | IT Health Checks | Network Monitoring | vCDO / vCIO / vCISCO



**Dealer Management Panel**



# Dealer Management Benefits

- ▶ Store all Indirect Dealer information in a centralized location and track dealers as the move
- ▶ Create Dealer Scorecards for Dealers and Employees
  - Competitive edge over other FI's by value add
  - Adds credibility to your FI
- ▶ Track Dealer Promos
- ▶ Understand Dealer's Metrics by Credit Tier
- ▶ Lost Sales Analysis including Loan Officer Analysis
- ▶ Robust Reporting and Dashboards
  - Create reports and refresh instantly with the ability to “slice and dice”, filter and print – HUGE efficiency
  - Trendlines – month over month, year over year
  - Easy access for potential compliance requests
  - **Mobile:** Subscribe to dashboards to get updates weekly, daily, multiple times per day

# Quick Start Implementation of Dealer Management

**Investment: \$45,000\***

## Functionality

- ▶ Store and Track All Dealer Info
- ▶ Reporting and Dashboards
- ▶ Creation of Dealer Scorecards for Dealers and Employees
  - Trending analysis
  - Credit tier analysis
- ▶ Mobile Set-Up

\*Does not include annual license cost and integration cost

# Full CRM Implementation Quick Start

Slide 1 of 2

Package Offerings		
	Accelerator Quick Start	Additional Functionality Options
Functionality	<p>Investment: \$65,000 - \$95,000*            Timeline: ~ 8 -10 weeks*            *Depending on scope, requirements, and client availability</p>	<p>Investment: TBD depending on selections</p>
	<ul style="list-style-type: none"> <li>• Roles &amp; Profiles</li> <li>• Business Milestones</li> <li>• Account Management - Person &amp; Business</li> <li>• Financial Account Set Up</li> <li>• Activity Management / Email Template</li> <li>• Cases - Service Requests, Complaint Management, Queues, List</li> <li>• Chatter</li> <li>• Field Tracking History</li> <li>• Service to Sales Process: Lead &amp; Referral Management, Queue Routing, List Views</li> <li>• Guidance for Success</li> <li>• Opportunity Management: Opportunity Page Layouts &amp; Set up, Discovery Questions</li> <li>• Campaign Management</li> <li>• Web to lead</li> <li>• Goals &amp; Life Events</li> <li>• Homepages and Service Console for Agents</li> <li>• New Member Discovery Needs Assessment</li> <li>• Outlook Integration</li> </ul>	<ul style="list-style-type: none"> <li>• Call Center Verification</li> <li>• Call Center - Transaction View</li> <li>• Personalized Home Pages by Roles</li> <li>• Application History</li> <li>• BD Event Forms</li> <li>• Next Best Action</li> <li>• Automated New Member Onboarding</li> <li>• Chat / Text</li> <li>• Warning Codes</li> <li>• Relationship and Householding</li> <li>• Surveys</li> <li>• Additional Personalized Homepage</li> <li>• Mobile</li> <li>• Workflows</li> <li>• Action Plans</li> <li>• Partner Management</li> <li>• Consumer Short Application</li> <li>• Indirect Onboarding</li> <li>• Branch List Creation</li> <li>• Dealer Portfolio Monthly Reports</li> </ul>

# Quick Start Slide 2 of 2

## Reports / Dashboards

- Case management
- Lead Management
- Opportunity Management
- Reports/Dashboards - User Adoption Dashboard under Quick Start
- Lead to Funded Dashboard
- 3 Additional Customized Dashboards
- Indirect Onboarding Dashboard
- Employee Goals to Results & Incentive Dashboards

## Training

- Two train the trainer session (up to four hours each). Additional options available.

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*Demo*

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