



PEAPACK-GLADSTONE BANK

Private Banking since 1921

## Transforms Client Experience with Bottomline Insights & Relationship Management

*“What we are delivering with Bottomline will meet the unique needs of our wealth advisors, while helping them understand and grow relationships that extend into the bank in ways wealth-only solutions can’t deliver.”*

- Dave Collum

Peapack Private Chief Operating Officer



## Challenges

- Replace a costly, inflexible CRM implementation with an easier & more intelligent solution to manage and grow complex financial relationships across multiple business lines
- Identified a need to map out customer journey to improve experience and interactions to strengthen relationships

## Solution

- Bottomline Digital Banking IQ – Banking Relationship Management to improve the client experience, increase referrals and collaboration across the org and manage performance through consolidated, actionable and timely reporting

## Results

- Quick implementation and migration of users and information in just 15 weeks
- More timely and actionable intelligence to drive client engagement and business performance
- Replace hundreds of fragmented, business-specific reports with a consolidated framework requiring only six core reports to track pipeline, referrals, call reports and user adoption consistently across the entire bank
- Generate growth and risk insights based on a full understanding of each relationship
- Increases referrals and collaboration across banking and wealth management

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