

Finance

Enhance process management and collaboration

About

Valley Bank is a prominent mid-to-large regional bank managing over \$62 billion in assets. The bank has a robust presence in New Jersey, New York, Florida, Alabama, Illinois, and California and provides comprehensive retail and commercial banking services.

The challenge

As our organization grew through organic expansion and multiple acquisitions of small and mid-sized banks over the past two decades, we ended up with multiple processes for the same or similar procedures. Many of these processes were poorly documented, lacked clear definitions, and were difficult to find and share across the organization.

The solution

By implementing ProcessPro, Valley Bank:

- ◆ **Identified efficiency opportunities** by streamlining operations, uncovering areas for improvement, and leveraging software solutions where applicable.
- ◆ **Eliminated ambiguity and centralized processes** by standardizing and consolidating workflows to ensure clarity, consistency, and accessibility across the organization.
- ◆ **Automated circulation and compliance** by establishing a centralized system that facilitates automatic notifications for updates, approvals, and audits.
- ◆ **Enhanced process management** by utilizing ProcessPro to effectively organize, share, and monitor processes, ensuring they remain up-to-date and easily accessible.

Why us?

ProcessPro was selected for its user-friendly interface, robust process management capabilities, and its ability to maintain consistency in formatting and presentation.

Key results

- ◆ **Increased Efficiency and Productivity** – Identified duplicate and unnecessary steps in multiple processes, leading to streamlined processes and improved operational effectiveness.
- ◆ **Enhanced Collaboration and Communication** – Teams embraced new ways of working together, with increased engagement as they saw real-time improvements in their processes.
- ◆ **Improved Employee Engagement** – Employees developed greater trust in the organization's processes, recognizing ProcessPro as a valuable tool that eliminates manual and redundant tasks, allowing them to focus on high-value work and experience a sense of ease and comfort.
- ◆ **Faster Adoption** – Despite initial concerns about change, ProcessPro's adoption was smoother and quicker than expected, with strong acceptance across all levels of the organization.

Unexpected wins

- ◆ **Increased Trust in Processes** – The team developed a higher level of trust in their processes, seeing ProcessPro as a tool that supports and enhances their work, instilling a sense of security and confidence.
- ◆ **Positive Cultural Shift** – Implementing ProcessPro **shifted the mindset around process improvement**, fostering a culture where employees are more **proactive and engaged** in refining and optimizing their processes, bringing a sense of empowerment and positive change.

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ProcessPro has transformed our approach to process management, enhancing clarity, fostering teamwork, and setting us on a path toward continuous improvement.

Continuous Improvement Engineer

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