



# BLUESHORE FINANCIAL

FINANCIAL SERVICES

Pivotal CRM

## Who They Are

BlueShore Financial is a credit union that for over 80 years has **helped their clients improve their financial well-being** with a full range of everyday banking, wealth management, and insurance solutions. Their combination of customized solutions, expert advisors, and dedication to long-term client relationships is all provided in their trademark Financial Spa® branches.

## Solutions

BlueShore Financial is one of the many financial services Pivotal customers who have used and enhanced the application for around 20 years. Like all credit unions, BlueShore is required to run multiple systems for their core banking, loans origination, bill payment, data warehousing, marketing, and more. BlueShore uses Pivotal as a central system so that their employees can have a single logical point of contact into numerous essential systems. This has allowed BlueShore to take advantage of the **Pivotal CRM to provide extremely high-quality service** to their customer base within their Financial Spa branches. By partnering with Tokara Solutions, BlueShore has been able to utilize Pivotal's extreme customization abilities to provide a best in class financial services CRM to both their employees and clients.

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We've had the pleasure of working with Ryan Schieman for many years on key CRM initiatives at BlueShore Financial, most recently in his role as Senior Pivotal Architect at Tokara Solutions. His expertise and trusted relationships with our developers and IT management have made him a valued extension of our team

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James Randall, IT Director

## Success Story.

BlueShore's vision to use their CRM to its fullest has allowed them to have almost all front end users rely on Pivotal to provide consistent and personalized high-end service to their clients. Tokara Solutions works closely with BlueShore to augment and advise their IT department. Pivotal's ability to be enhanced and integrated, has allowed it to be an **integral part of BlueShore's system of financial applications.**

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