![Paylocity logo — Forward Together.]

Bank Saves Hundreds of Hours to Invest in Strategic Priorities

Coulee Bank has served western Wisconsin and the greater Minnesota area for more than 60 years. Their mission is to always do the right thing for their clients and colleagues, but the HR team of one was doing nearly everything by herself. So Coulee Bank's Chief Human Resources Officer (CHRO) Amy Bauer decided to invest in a new solution by banking on Paylocity to help shoulder the burden and take some of the manual workload off her plate.

The Challenge

Open enrollment can be a headache for any seasoned HR professional, but it doesn't have to be. Amy was spending almost 200 hours collecting information, updating open enrollment elections, and answering questions during open enrollment. "I'd have to manually collect paper election forms, scan them in, and then manually make changes in all our plans," says Amy. "In many cases, I would have to log in to five different websites for just one employee. I would easily spend nearly two hours per employee during the month of December, the busiest month for HR."

For years Amy gathered her data by cobbling together information from various spreadsheets and different systems before she could get a complete picture. She would spend hours combing through reports, such as benefits and salary costs, trying to calculate information manually, which resulted in a high risk of human error and wasted time.

![Coulee Bank logo — BANK WITH CONFIDENCE]

Industry	**Size**
Financial Services	87 employees
Location	**Customer Since**
La Crosse, WI	2016

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Amy Bauer, Chief Human Resources Officer

Coulee prides itself on its inclusive culture, but 2020 shined a spotlight on Diversity, Equity, and Inclusion (DEI) efforts for HR professionals everywhere. "We didn't really have a way to easily see how our diversity is represented across the organization and that made strategizing how to improve complicated but also very important."

The Solution
Complicated is often a sentiment many people feel about switching software providers, but with the transfer to Paylocity's Benefits, Amy was able to automate the majority of the open enrollment process. Employees can easily log in to the employee Self-Service Portal and make their own elections electronically. Amy no longer needs to print, scan, and manually type in selections – saving her critical time during the holiday and year-end seasons. "The Benefits module is so easy to use, and everything the employee needs is accessible in the same Paylocity app they are in daily to access pay checks or request time off," says Amy. "It's a huge relief and time savings for me!"

With a modern workforce solution, Paylocity's all-in-one platform offers reporting at the deepest level. With the Modern Workforce Index (MWI) and Data Insights, Amy can drill down into her metrics to quickly pull reports in a matter of minutes. "I monitor employee headcount, turnover, and growth rate on a monthly basis. I can keep an eye on the labor costs and monitor those trends to compare to what we have budgeted with the dashboards available. There's even a benefits reconciliation report with all that information available. I can explore average salary by gender, disability, generation, and more. The visibility is amazing."

Visibility and transparency are more important than ever, and with the growing awareness and emphasis on DEI strategies, Amy was able to leverage Paylocity's Demographics Dashboard to report current standings companywide. "We pride ourselves on being a fair and inclusive culture," says Amy. "We discuss our standings on diversity, ethnicity, and generational breakdowns in our quarterly financial meetings. It's been so valuable to be able to pull this demographic information quickly to share with employees."

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> **"There were so many areas I knew we needed help with, but seeing the difference is mindblowing."**
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Problem
Open enrollment was exhaustive and manual — spending nearly two hours per employee entering data. It was also a struggle to find diversity representation breakdowns for the organization.

Solution
Employees can access the benefits module and open enrollment from the Paylocity App — eliminating paper forms while the demographics dashboard makes it possible to monitor gender, disability, race, and generation, as well as turnover among employees.

Results
Automating open enrollment saves approximately $17,000 and 200 hours per year and an addtional 125–175 hours are saved annually during the onboarding/training process with Paylocity.

The Results

Sharing information with employees has always been a key priority of Coulee's leadership. However, with the Paylocity platform Amy finds herself fielding less of the same repetitive questions. Automating the open enrollment process has not only saved her nearly 200 hours, but employees have less questions. According to a recent study by Deloitte, automating open enrollment can save companies almost $17,000 annually. "Year End is a busy time for HR. I know it may not look like a lot of time saved in total, but when you consider I was a department of one up until about 18 months ago, the impact this has had on what I am able to focus my time and energy on is incredible. It's been a huge relief for me and a big impact to the company's bottom line."

That's why Paylocity's Modern Workforce Index includes a return on investment (ROI) calculator which provides the numbers to measure impact on the bottom line. "There were so many areas I knew we needed help with, but seeing the difference is mind-blowing," says Amy. "I used to spend approximately five to seven hours on each new hire working onboarding paperwork and ensuring they were set up in our system. Now, they come in on their first day with their paperwork completed, policies reviewed, and they're ready to get started! In the past year, we've had 25 new employees, so that's approximately 125–175 hours back to focus on improving their training or other areas of the business." Amy also explains how expenses used to be an incredibly manual process. "Our accounting team spent three or more days each month and now it's a non-event. The biggest value we've seen with Paylocity's Expenses module is that now managers have visibility to see the reports and can push back and it really holds the employees more accountable, which in turn has also saved our company's bottom line!" With 25 new hires in the last year, Amy has been busy with recruiting. "I've calculated that our recruiter saves approximately

10 hours of work per hire just by using Paylocity's Recruiting module. Paylocity makes it possible for us to have our data and information all in one platform, and that makes us more efficient all around."

With hundreds of hours saved throughout the year, Amy and her lean team are able to put more focus on their HR strategy, including DEI. "Working in the financial services industry there's a lot of opportunity for our industry to improve. This includes promoting more women and minorities in mid-level leadership roles, executive leadership, and board-level positions. We still have plenty of work to do to get to where I would like to see us, but with Paylocity's insights, we are able to see our gaps and where we are making progress." Creating and sustaining an action plan is made possible by having transparent data available. Even at the recruiting stage, being able to bring a diverse sample to the interview table can make a huge difference. Amy can research equality rates in promotions, turnover, and hiring as key performance indicators to measure their DEI progress. "We chose Paylocity because the ability to save us time, but having access to all the data, we are able to spend our now freed time on things that really matter, such as fostering a great and inclusive place to work."

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