

West Bend Mutual Insurance Company Finds Success with a Customer Success Plan



Overview

The staff at West Bend Mutual Insurance Company (WBMI) in West Bend, Wisconsin, hit new roadblocks each time their event management software was updated. Here's how joining the ranks of satisfied clients enrolled in an Momentus Customer Success Plan helped them reach new levels of efficiency.

Organization:

West Bend Mutual Insurance Company

Industry:

Venue Management

Headquarters:

West Bend, Wisconsin

The Challenge

The WBMI team had a laundry list of challenges:

- Updates to resources
- Tax and service charge options
- Window layout updates
- Managing Security staff
- Registration for company events
- Facilities labor tracking
- Select invoicing

“We originally chose the Momentus software program because of its customization features, knowing it would help us streamline our department procedures,” said Gina Lange, Event Coordinator. “However, while we used many of the program’s tools, the system was underutilized because of our team’s limited availability to learn all its nuances.”

The Solution

The WBMI events team was able to check off each challenge on that list by enrolling in an Momentus Customer Success Plan.

“Our desire to find a solution and fully benefit from the program led us to choose the Customer Success Plan. This investment has become a valuable asset for us,” Lange said.

Customer Success Plans are tailored to the unique needs of every client to ensure they get the most out of the software. Working closely with their Customer Success Manager, WBMI staff members overcame their list of existing challenges, while expanding Momentus usage across the entire organization at the same time.

For example, the security department now uses Momentus Orders to plan event security and enter information into a work order that can be easily viewed by all staff without having to view the notes. Registration was another feature WBMI staff saw the potential in but never used before having a Customer Success Plan. Both are now used for companywide events. WBMI has also added Premium Room Diagramming as an extension trial; in fact, the staff recently participated in the beta program for Room Diagramming and helped develop its functionality.

“Specifically, we appreciated the assistance in developing Room Diagramming, which was a significant leap forward for us,” said Alicia DeBlaey, Event Services. “Our Customer Success Manager organized meetings with product developers to assist us in implementing and testing to create room layouts quickly and easily.

“Having the Customer Success Plan in place gives us a lot of flexibility,” DeBlaey continued. “We can now be proactive in our planning process, updating projects literally at the last minute if necessary.”

The Result

With the help of Momentus's Customer Success Plan, the events staff at WBMI was among the first organizations to fully implement Premium Room Diagramming. Registration has been adopted for all company events. Two new office locations to be managed with Momentus software were also recently added.

"Our business profile is unique in that we manage our facility services and event space for both internal and external stakeholders," said Lange. "The Customer Success Plan gave us a dedicated representative that understood our needs and worked with us step by step like an extension of our team, identifying what needed to be done and designing the system to execute the project."



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Gina Lange

WBMI

Contact us today to explore opportunities to improve your venue and event management.

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