



Back to Business

Partnering with Boss Insights to deliver the right technology and a customer-first approach during the COVID-19 pandemic.

October 2020



For over 25 years, CCBank has provided a personalized touch in our service to clients with a focus on building relationships and providing quick, local decisions and innovative solutions for our clients. At the onset of the COVID-19 pandemic, our focus quickly turned to helping as many business clients as possible in a very short amount of time. Our core mission to 'Go Beyond Banking' became quite literal with the Payroll Protection Program (PPP) and as businesses needed this critical funding and the support they found at CCBank to remain open.

CCBank & Boss Insights

CCBank is committed to providing support to our clients who are navigating the forgiveness portion of their PPP loan. To streamline the process, CCBank has brought on board Boss Insights' proprietary platform that will provide our business borrowers access to forgiveness calculations and other resources that will seamlessly serve our clients. The partnership between CCBank and Boss Insights delivers an automated forgiveness process and convenience for clients focused on getting back to business.



“This crisis really drove home the importance of banking at the local level. We helped out as many businesses as we could through the PPP, and now we’re working with these businesses to navigate the guidelines outlined through this important program. We’re also glad to have Boss Insights as a tech partner to help streamline our process with these clients.”

- Mike Watson, CCBank President & CEO



Utah Proud

Neighbor serving neighbor. That's the spirit required in rebuilding during a crisis and ensuring that our small business community remains intact.



Customer Focused

In a time of crisis, it's important to know your banker and be assured that they know you and understand your financial needs.



We Hear You

We are a bank that listens and treats you with the care and respect you deserve. Aligning the demands of your business with our solutions is our focus.



INNOVATION & AUTOMATION

COVID and PPP created an unprecedented need for loans in the market. SBA stated that they processed 14 years worth of loans in 14 days. As SBA lending experts, CCBank acted quickly to process these loan requests but like many other lenders at the time, struggles arose. The paperwork and guidelines for PPP were confusing and manual.

Our business customers needed us more than ever to navigate forgiveness, but hours of manual effort stood in the way of offering true support and personalization.

CCBank is proud of our customer-first approach and knew that we needed to act fast in order to serve not only our current customers but also the community. We partnered with Boss Insights who, in record time, was able to offer seamless solutions to these business owners who needed to facilitate their loans and navigate the loan forgiveness parameters established by the SBA.

“CCBank has become a trusted partner during the effort to expand our center for the arts. It's a bank with a community in mind, and it's been refreshing to work with their team.”

- **Summerisa & Spencer Stevens**
Harrington Center for the Performing Arts
Pleasant Grove, Utah

OUR LEGACY IS PROTECTING YOURS.

During these unprecedented times, it is so essential to be a partner in protecting the legacies of our business clients. That's why we sought out a partner to further deliver the quality and service our clients expect. Through the Boss Insights loan forgiveness portal, we continue to be an essential partner to businesses working side-by-side with our clients to ensure that these essential PPP loans are not a burden beyond the scope of this pandemic.

The loan forgiveness portal that we've delivered to our clients offers several key benefits, including:

50% MORE LOANS PROCESSED

A loan form that adjusts to borrower needs instantly speeding up the time for approvals.

90% DIGITIZATION

Complex processes made easy resulting in reduced manual effort

2X SUCCESSFUL APPROVALS

With accurate data, CCBank's forgiveness process was twice as successful as peers.

80% TIME SAVINGS PER LOAN

With seamless data sharing, businesses got access to automated calculations to get them served faster.

About Boss Insights

In an era where tech giants have increased customer expectations, lenders and private capital providers are challenged to offer complete and personalized solutions. Boss Insights' data platform gives lenders the clearest view of their business customers. The platform accelerates small business and commercial lending from months to minutes. It also increases sales opportunities for other financial products. Our mission is to provide banks and credit unions with a real-time understanding of their business client enabling them to offer customer delight.

Boss Insights' provides banks and fintechs with Business Data as a Service. The API hub enables easy access in under 1 minute to the leading number of APIs bridging data gaps between banks and business customers. With access to real-time data on businesses accounting (Quickbooks), payments (Stripe), sales (SalesForce) and more, banks are empowered to accelerate lending and cross selling from months to minutes and provide personalized service to their business customers.

Banking with Community in Mind.

This year has truly brought struggle and strife to our community. Together, we are overcoming tremendous challenges and headwinds—particularly for those beloved businesses that provide essential services and products that contribute to a wonderful quality of life for all of us in the state of Utah.

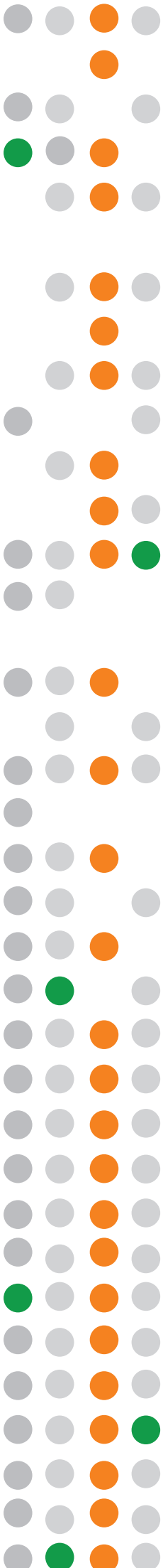
While this pandemic continues to impact those close to us—our friends, families, and neighbors—all of us at CCBank want to ensure that we are fulfilling the needs of our community by maintaining the personalized service that we've been known for since 1993.

Our partnership with Boss Insights is truly an innovation that delivers on that service promise. The loan forgiveness portal not only connects our lending team at our five branch offices with our clients who received a loan through the PPP, it automates much of the paperwork and cuts down quite a bit of the hassle for our clients.

In short, this technology offering exclusive to our PPP clients transforms an arduous process to one that is fast, personalized, and relatively hassle-free.

That's neighbor serving neighbor. That's going beyond banking.





3280 N. University Avenue
Provo, Utah 84604
www.ccbank.com



Toronto Office:
20 Dundas St W, Suite 921
Toronto, ON M5G 2H1, Canada

Boston Office:
695 Atlantic Ave,
Boston, MA 02111, U.S.A

www.bossinsights.com