SLK

Salesforce enabled Business Operations
Sales + Service Automation

Context

Asset Size of USD 27B. This regional bank has 29 locally branded divisions, 280 offices

o Leverage Salesforce.com features and functionality to build an effective collaboration platform for proactive case management

o Process automation and activity management to standardize business processes

o Create customer portal for easier and centralized origination process

o Collaboration and co-ordination between various stake holders in an opportunity

Products used

Sales Cloud, Service Cloud, Community Cloud

Solutions & Methodology

Sales and Service management – Solution type

Ui path

Focused Agile teams – Global Delivery

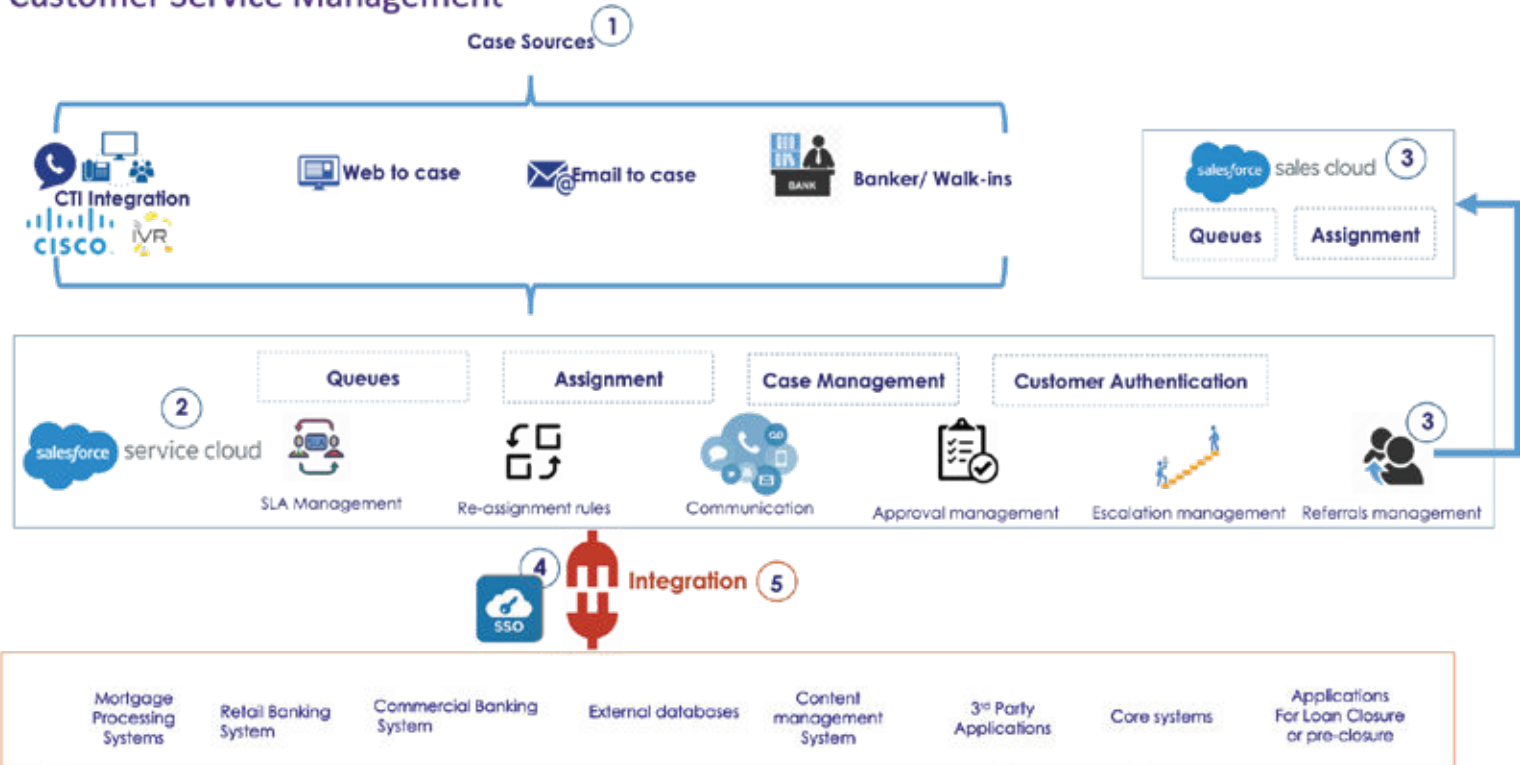3 squads each with 9 members including BA, Architect, Dev, QA

Challenges

o Dependency on MS Outlook to raise cases/ service request and share attachments

o Manual activity in segregating and assigning of the requests to the 'Bank Specialists' team.

o Users required to manage the rules manually to assign requests to Bank service specialists

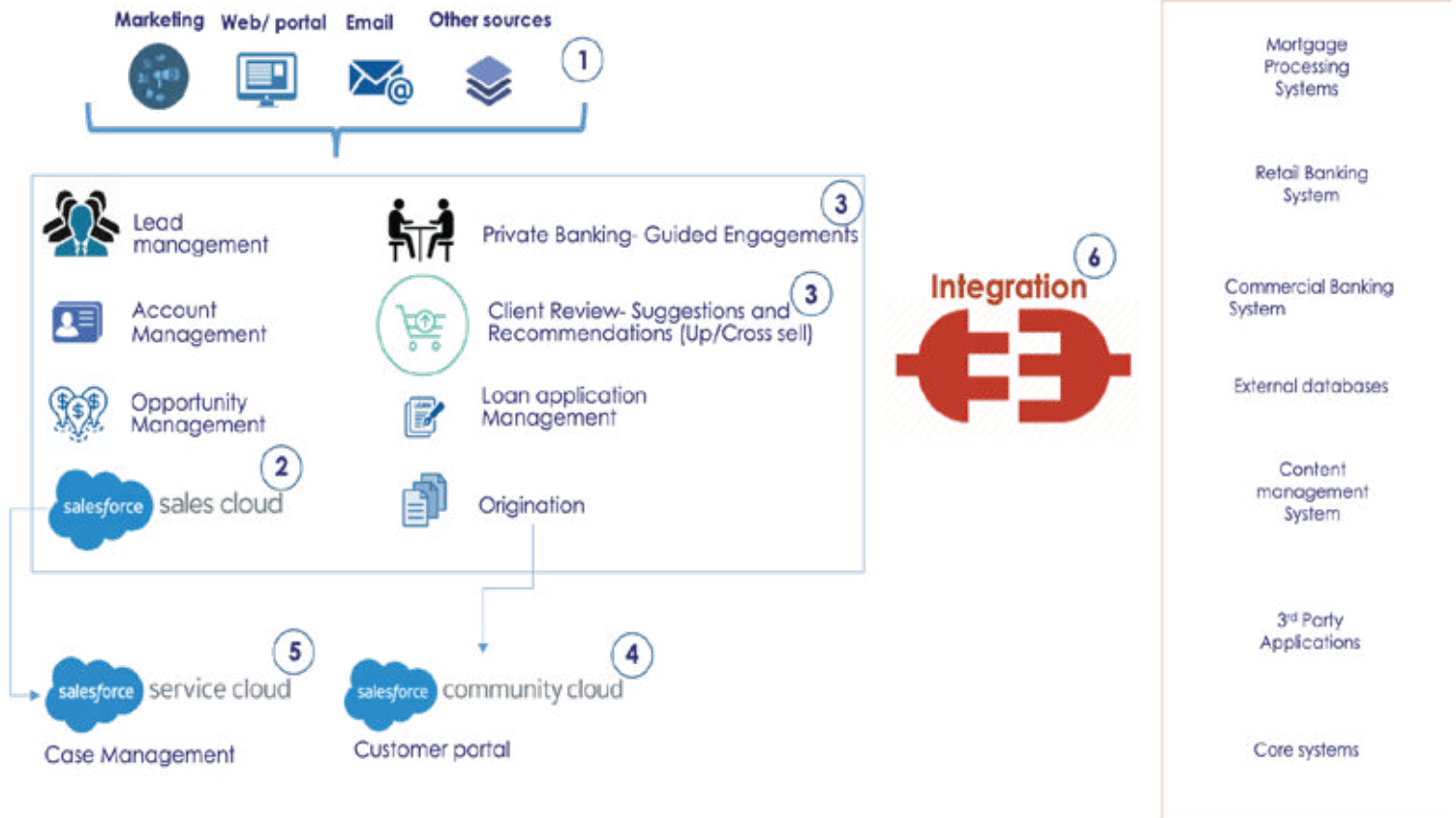o Manual effort required to track the efficiency of the service specialists.

Benefits

o In-depth case visibility

o Reduction in turnaround time

o Standardization of processes

o Ease in tracking resource efficiency

o Intuitive and simple interface

o Increase in customer acquisition

o User friendly app for quicker approvals for smoother sales process by Small business and Commercial banking users.

o One view of balance enquiry for multiple accounts.

Customer Service Management

Sales Management