



The client is a Chicago-based leading Banking and Financial Services Institution that takes pride in being committed to their customer's success. They specialize in banking, custom lending, equipment financing, business capital loans, etc.

Challenges

While their banking operations were well served by custom financial apps, their presales and customer acquisition teams were still using excel to manage their data. They were tracking and managing the entire customer journey from prospects to opportunities to customers on a shared excel sheet. The client had aggressive growth plans and a sales team depending on excel was not part of the agenda. The management opted to invest in Salesforce as it is the #1 CRM in the world and selected DemandBlue as their Salesforce partner for implementation, insight, and support.

Solution

DemandBlue engaged the customer via the On Demand Services model and immediately deputed a Customer Success Manager for the client. The CSM had a series of meetings with all stakeholders to understand the business priorities and expectations. Armed with an exhaustive implementation plan, a team of experts visited the client's site and discussed the implementation plan with all stakeholders including end users. The client required a Salesforce Lightning defined Sales path based on region (Counties, Stats, etc.) and Business Process (Syndication, Commercial Real Estate, Sponsor, Healthcare, etc.).

The implementation was successfully executed under 4 phases –

1. Creating user profiles, customizing fields, setting up workflows, etc.
2. Data migration from existing databases into Salesforce
3. Creation of custom reports and dashboards
4. Integration of core apps (Nautilus Loan Tracker & Fiserv Core System) with Salesforce

Benefits

- The sales team benefited immensely with the Salesforce implementation as the sales cycle became shorter by 55%
- The client saw an immediate rise of customer base by 33% within the first few months of Salesforce implementation
- Crisp workflows, clear dashboards, and pleasant Lightning visuals increased employee engagement and efficiency
- Both customers and employees were pleased with the quicker task resolution times.
- Comprehensive integration of Salesforce CRM with Nautilus Loan Tracker & Fiserv Core System enabled data transfer and provided a 360-degree view of the business