



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

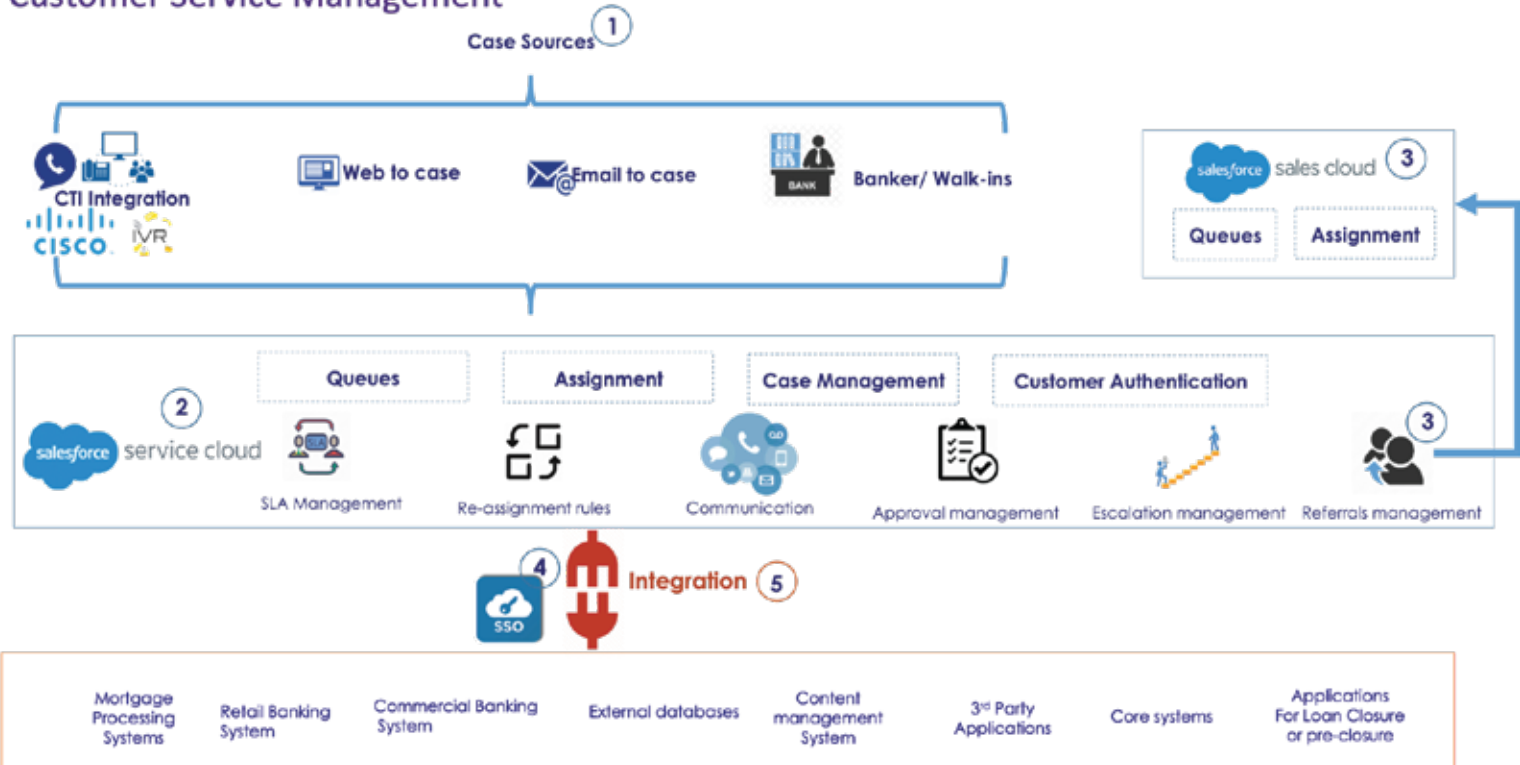
Challenges

- 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.

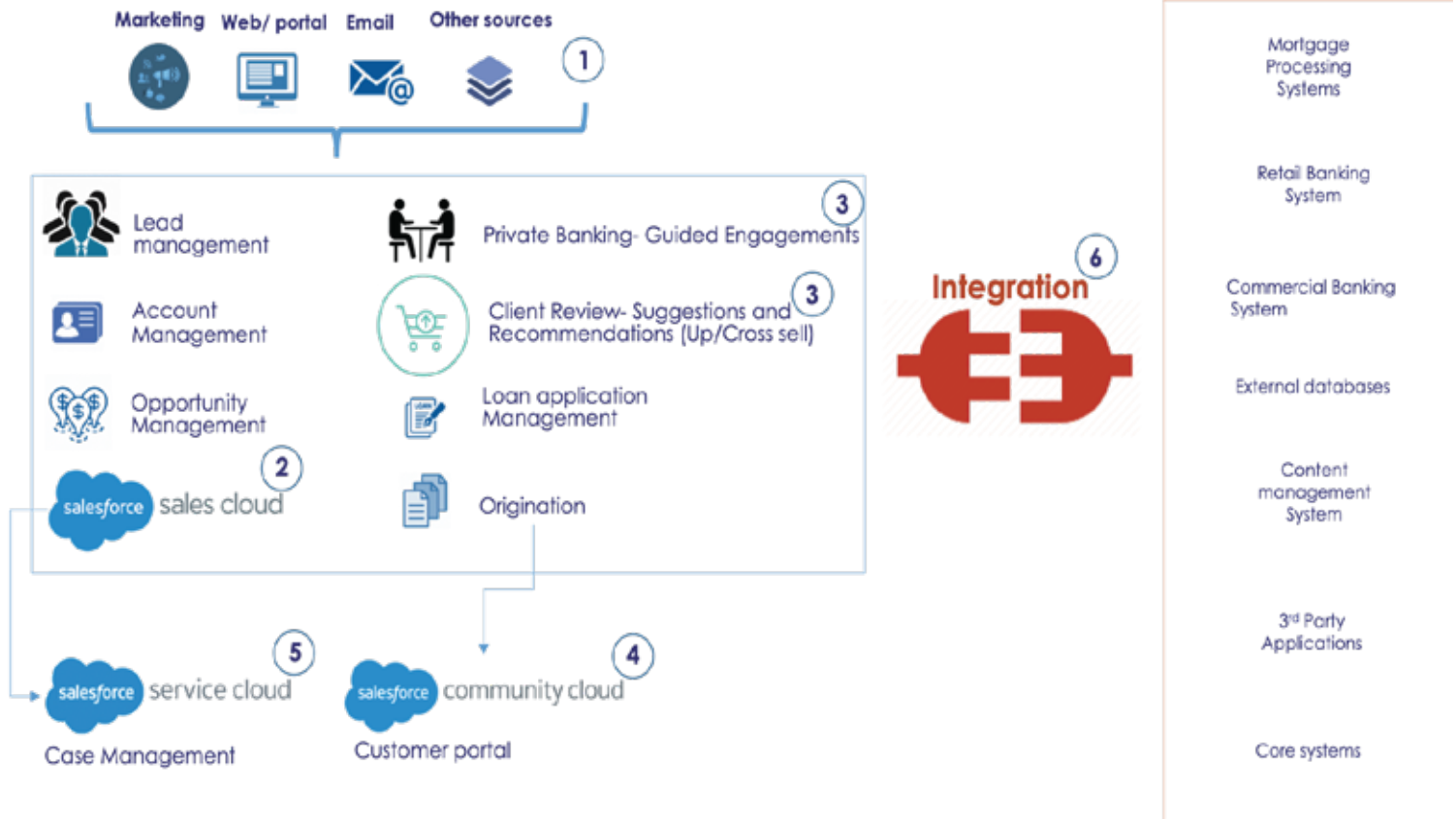
Benefits

- 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



Ready to Enable Autonomous Assurance?

Get in touch with us.

<https://www.linkedin.com/company/slk/>

<https://www.facebook.com/SLKSoftware/>

Visit us at <http://www.slkgroup.com/software/>

For more information reachus@slkgroup.com

