



Case Study

360 Degree View with Single Pane of Glass

Sales and service automation on Salesforce improves business outcomes for a regional bank.

Case Summary

A regional bank in the US had disparate sales and service systems across multiple channels. This inhibited their ability to get a single view of the customer to improve the customer experience and cross-sell/upsell opportunities. SLK helped integrate customer's diverse systems on Salesforce to create a 360 Degree View as single pane of glass for the sales and service teams.



The Challenge

The client, a regional bank in the US has 29 locally branded divisions and multiple offices in different locations. Multiple systems across various sales and service channels prevented teams from getting a single view of the customer. Fragmented data in siloes impacted their ability to cross-sell/ upsell new products and respond quickly to customer service requests. In addition, the entire sales and services processes were heavily dependent on manual interventions. For instance, the team was dependent on emails to raise cases/service requests and share attachments. Requests were manually segregated and assigned to specialists, and the efficiency of service teams was also tracked manually. The client wanted a partner who could help them streamline the processes, bring in automation, and help them get a single pane of glass view of the customer. SLK was the best fit for the task.



The Solution

The SLK team onboarded and assessed the existing landscape to identify gaps and areas of improvement. We reimagined the client's sales and service processes, bringing in standardization and process automation. Focused Agile teams worked on a global delivery model to build an effective collaboration platform. This enabled proactive case management, Digital Customer engagement platform for faster, secure and centralized origination process using Salesforce.com. The product mix includes Sales Cloud, Service Cloud, and Community Cloud.



Business Impact

Enabled single pane
of glass view

Reduced TAT

Increased customer
acquisition

SLK's Efforts Showed Quick Results:

- Standardization and automation reduced the turnaround time for sales and service case management
- A single pane of glass view provided in-depth visibility across Sales and Service customer journeys.
A collaborative and automated platform between various stakeholders for reduced turnaround time
- The new interface was intuitive and simple to use, helping the bank's team spend more time on personalized offerings
- The automated system made it easy to track resource efficiency
- Integrated customer portal for digital origination and loan processing
- Improved sales and service increased customer acquisition and created more upsell/cross-sell opportunities
- User-friendly app for quicker approvals and smoother sales process for small business and commercial banking users

Write to us at hello@slkgroup.com

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