

HCLTech X Salesforce: Transforming cloud systems for **financial services**

Improving customer onboarding and
collaboration for a German major



Client Overview

A global investment bank and financial services company headquartered in Germany uses technology to increase collaboration among the sales team, gain customer insights, and improve their on-boarding.



Challenges and Goals



Use of spread sheets to maintain customer details till the time prospect becomes bank client



Lack of end-to-end customer experience and effective communication deriving significant business impact



Lack of automated system operations, real time visibility and requisite integrations with internal systems and applications



Intent to undertake cloud transformation journey with Salesforce as single CRM platform



Lack of proper communication between sales representatives of different domains

HCLTech's Solution

Sales Cloud

- Implementation and enhancement of sales cloud application including Accounts, Contacts, Opportunities & Campaign Modules.

Financial Services Cloud

- Implementation & enhancement of financial services cloud application including financial Accounts, Revenues.

Salesforce Shield

- Implementation of Salesforce shield for encryption of customer sensitive information.





Wave Analytics

- Wave analytics is configured for Campaign, Account, revenue & Sales representative performance analytics reporting

CI/CD

- Implementation of Continuous Integration / Continuous Deployment for smooth development and deployment using TeamCity, Bitbucket, and ANT
- Implemented as Global code base covering 90% of CRM functionality whereas 10% is region specific configuration / customization. Regions covered till now are Germany & APAC, same will be replicated for Switzerland & USA
- Integration with Avaloq using Informatica

Outcome and Impact

Smooth collaboration among the Sales team



Streamlined release management helps deploy new products, features, at a faster rate

Improved sales performance through continuous monitoring and enhanced collaboration amongst the sales team



Tracking customer onboarding process help with valuable insights right from campaign to account planning



For any queries, please reach out to us at digitaltransformation@hcl.com

HCL

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