

# Modernized disparate legacy systems for a **banking major**

How HCLTech leveraged Salesforce Financial Services Cloud to deliver intelligent customer solutions



## Client overview

The client is a leading African bank and financial services group offering retail, commercial, and institutional services to more than 38 million customers. They are present in 28 countries across 5 continents.

# Challenges and goals

A photograph of two men in a professional setting. The man in the foreground is wearing glasses and a blue button-down shirt, looking towards the right. The man in the background is wearing a brown jacket over a purple shirt, looking towards the left. They appear to be in a meeting or discussion.

The client wanted to automate and streamline its banking operations and enable its relationship managers and C-level executives to serve their institutional and individual customers effectively. However, it was facing the following roadblocks:

- Minimal interoperability between its multiple core banking systems and legacy applications
- Cumbersome manual customer onboarding and KYC processes
- Lack of real-time, comprehensive view of customer data, product performance, 3rd party integrations, etc
- Absence of AI-enabled opportunity identification and advanced analytics

# HCLTech's solution

HCLTech was engaged by the client for the strategy to implementation services and leveraged its dev-ops operating model, technical architecture expertise, and distributed offshore and onshore resources to provide an end-to-end solution. Here's how the solution paved the path for client success:

- Implemented Salesforce Financial Services Cloud features like retail & investment banking, insurance, etc
- Architected solutions for customer support and sales process enablement across business groups
- Provided a unified view of customers, partners, and related parties
- Replaced legacy systems and applications by integrating Salesforce with the core banking system and mobile application
- Enabled experience cloud for customer and partner self-service
- Set up omnichannel and multiple data sync sources using amazon EC2 (elastic compute cloud) and RDS (relational database)
- Streamlined communication through CTI (computer telephony integration) with Amazon Connect

# Outcome and impact

HCLTech's holistic approach to business transformation helped the client achieve the following business results:

- 360-degree view of the entire customer journey
- Real-time integration with core banking systems
- Real-time feeds synched with multiple systems across geographies
- Self-service enabled for customers and partners
- Automated customer onboarding and KYC processes
- AI-driven insights into lucrative business/investment opportunities

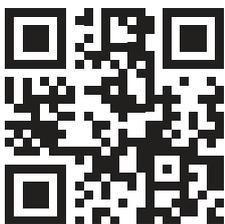
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