

# Modernizing disparate legacy systems for a banking major

Leveraging Salesforce Financial Services Cloud to deliver intelligent customer solutions



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**.



## The Objective:

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.

## The Challenge:

The client was confronted with a number of obstacles, such as a lack of connectivity between its many core banking systems and older applications, as well as laborious manual customer onboarding and KYC procedures. Another significant difficulty was the absence of a real-time, full picture of client data, product performance, third-party integrations, etc. Additionally, they lacked advanced analytics and AI-enabled opportunity identification.

## The 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:

**1** Implemented Salesforce Financial Services Cloud features like retail & investment banking, insurance, etc

**2** Architected solutions for customer support and sales process enablement across business groups

**3** Replaced legacy systems and applications by integrating Salesforce with the core banking system and mobile application

**4** Enabled experience cloud for customer and partner self-service

**5** Provided a unified view of customers, partners, and related parties

**6** Streamlined communication through Computer Telephony Integration (CTI) with Amazon Connect

**7** Set up omnichannel and multiple data sync sources using Amazon EC2 (elastic compute cloud) and RDS (relational database)

## The Impact:

The client was able to achieve their business objectives with HCLTech's comprehensive approach to business transformation. They now possessed a comprehensive understanding of the whole client journey, real-time integration with core financial systems, and real-time feeds synchronized with several systems across geographical boundaries. Additionally, we automated the customer onboarding and KYC processes and allowed self-service for partners and customers. Another significant achievement has been the AI-driven insights on profitable business and investment prospects.

