Digital & Analytics
by HCL Technologies

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Enabling future ready agile enterprises

Driving transformation for a leading global
investment bank and financial services company

Introduction

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 customer on-boarding.

Business Challenges

- 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
- Was looking to undertake cloud transformation journey with Salesforce as single CRM platform
- New system should establish proper communication between sales reps of different territories.

Our Solution

Sales Cloud
- Implementation and enhancements 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 Rep 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.
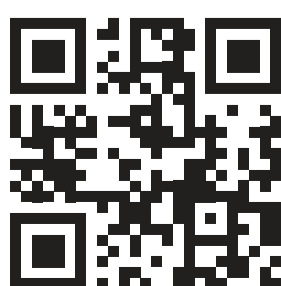
Business Impact

- Smooth collaboration amongst the Sales team
- Tracking customer on boarding process (Campaigns till Account planning)
- Improved sales representative efficiency and customer on-boarding process tracking
- Streamlined deployment and release management process

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