

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

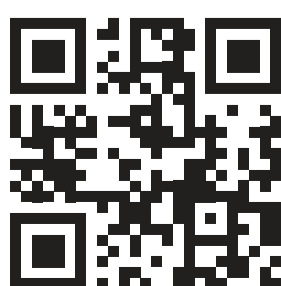
- Smooth collaboration amongst the Sales team
- Tracking customer on boarding process (Campaigns till Account planning)
- Improved sales representative efficiency and customer on-boarding process tracking
- Streamlined deployment and release management process

Write to us at digitaltransformation@hcl.com



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