

salesforce



KAMELEON  
SOLUTIONS

# Salesforce as a CRM solution in Financial Service Industry

22.09.21. TECHNOBANK

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# Doing Well and Doing Good, Together

salesforce

## Leader In Philanthropy



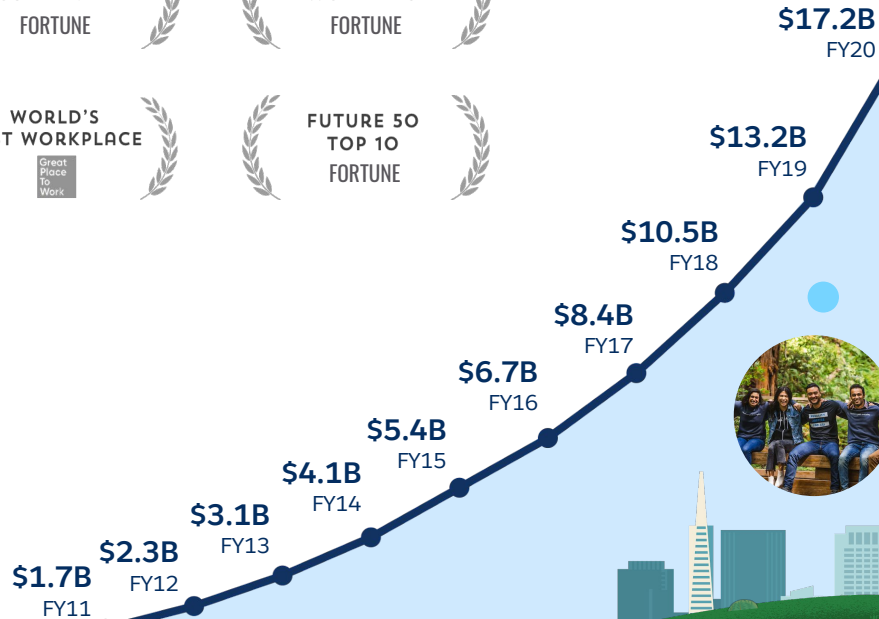
## Leader In Culture



## Leader In Innovation

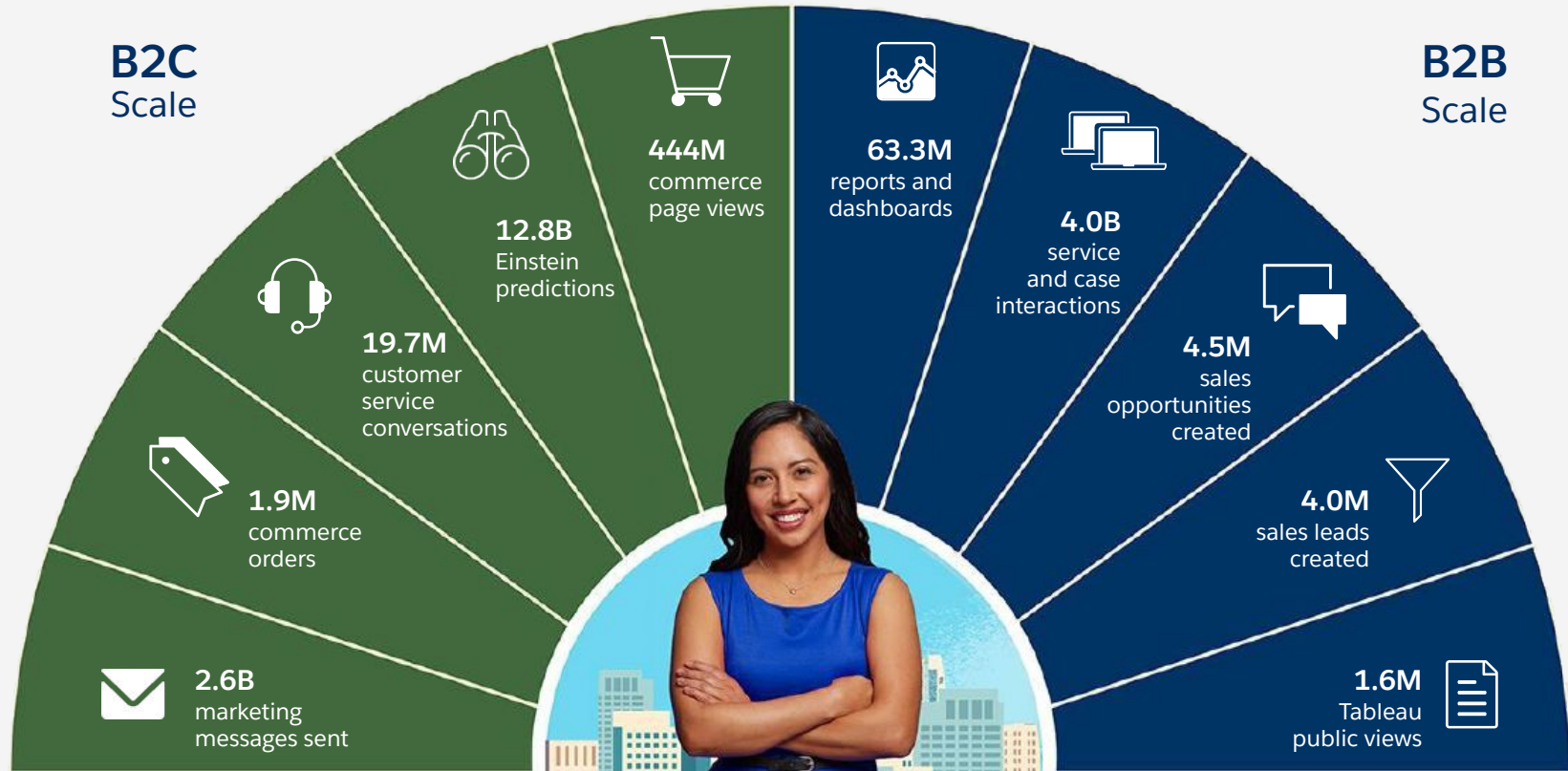


FY21 **\$21.25B**



\*From People, August 2020  
Meredith Corporation. Used under License.

# 24 Hours in the Life of Salesforce



Source: Salesforce November 2020.

# Slack-First Customer 360



Trailblazer Success & Community • World's #1 CRM • Fast Time to Value • Scalable & Flexible • Work From Anywhere



Experience	Apps	Web	Channels	Bots
Einstein	Automation	Workflow	Personalization	Low Code
Single Source of Truth	Data	Streams	Segments	Privacy

**Hyperforce**

# The World's Most Trusted Enterprise Cloud



Large or small, global business has no downtime



Reducing Downtime



Faster Recovery  
From Events



Keeping  
Customer  
Data Safe



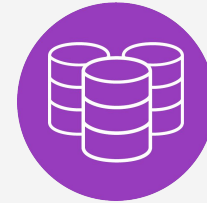
Rapid  
Incident  
Response



Trusted Security



Continuous  
Innovation



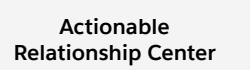
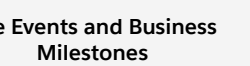
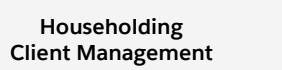
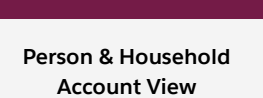
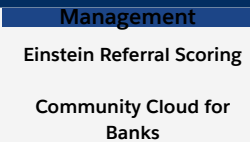
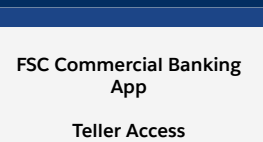
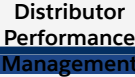
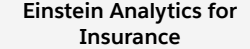
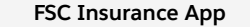
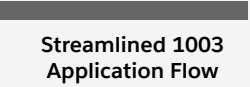
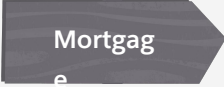
Multi-Tenant  
Infrastructure

# Financial Services Cloud Continues to Innovate



## At the center of every financial service offering is a customer

Financial Services Cloud extends Sales and Service Cloud. It is **embedded** in your CRM to connect all lines of business to **unify** the customer experience, and integrated with your **core** business processes to manage **relationship insights** and compliance.



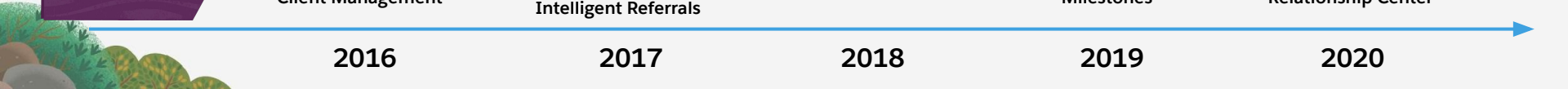
2016

2017

2018

2019

2020



# Optimized Mission Critical Processes Connect the Entire Journey

Bringing together customer, banker, service agent, mid-back office, and digital channels



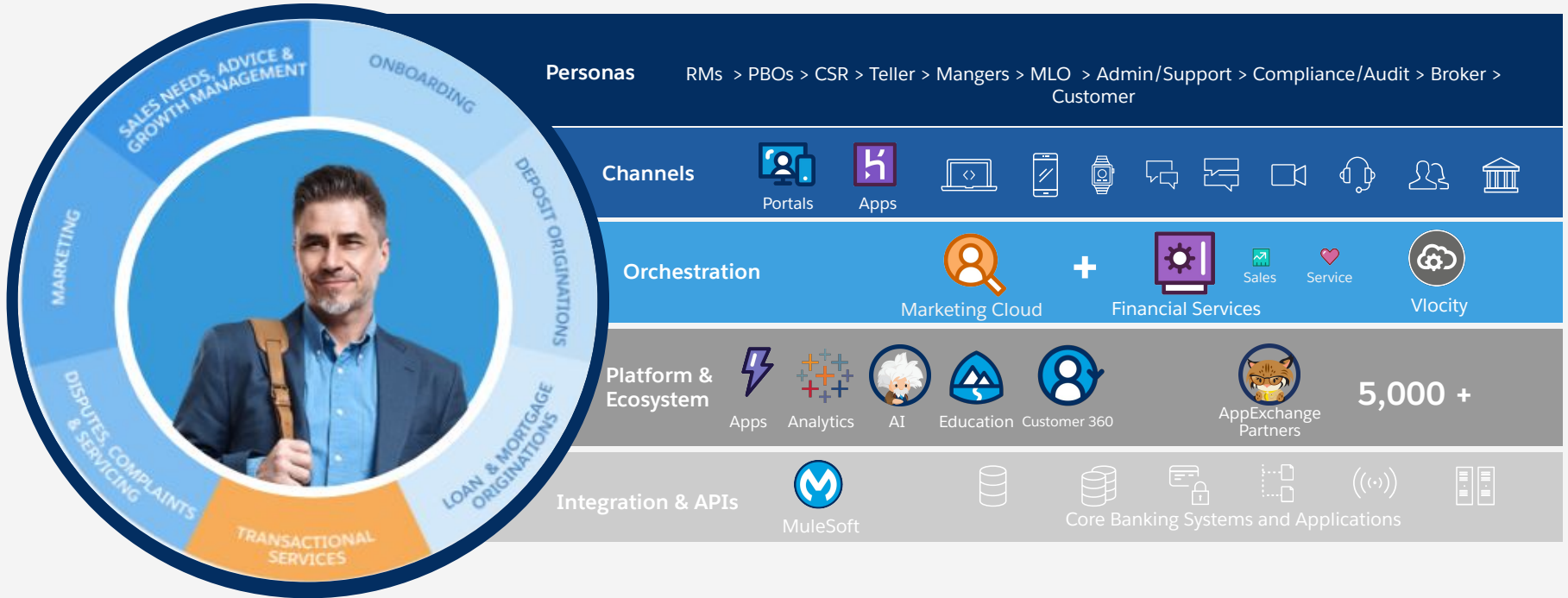
- ◆ ..... Customer Acquisition ..... ◆
- ◆ ..... Customer Onboarding ..... ◆
- ◆ ..... Loan Origination ..... ◆
- ◆ ..... Account Opening & Service Fulfillment ..... ◆
- ◆ ..... Customer Support ..... ◆
- ◆ ..... Customer Impact Management ..... ◆
- ◆ ..... Relationship Deepening ..... ◆
- ◆ ..... Business Management & Data Insight ..... ◆
- ◆ ..... Compliance Agility ..... ◆



# The Salesforce Platform for Banking



Much more than CRM





# Four Common Strategies in Successful Implementations



Success happens when there's a strong game plan in place and organizations stay the course



## Establish a Strategy

- Stakeholder Alignment
- Defining the 360 vision
- MVP Definition
- Less is More
- OOTB vs. Integration
- Batch vs. Real-Time
- 360 Roadmap



## Start with Thin & Wide

- Laying the Foundation
- Identify Common MVP Use Cases
- Connective Tissue
- More Than One Persona or Channel
- Project Roadmap



## Align IT & Business Strategy

- Deliver on Business Priorities First
- Establish Governance
- Simplify Architecture
- Define Target State
- Good vs. Perfect
- Lead with APIs
- Use Agile Development



## Consider Culture

- Address App vs. Strategy
- Steering Committee
- Align to Operational Model
- Change Management a ongoing process
- Champions
- Training vs. Enablement

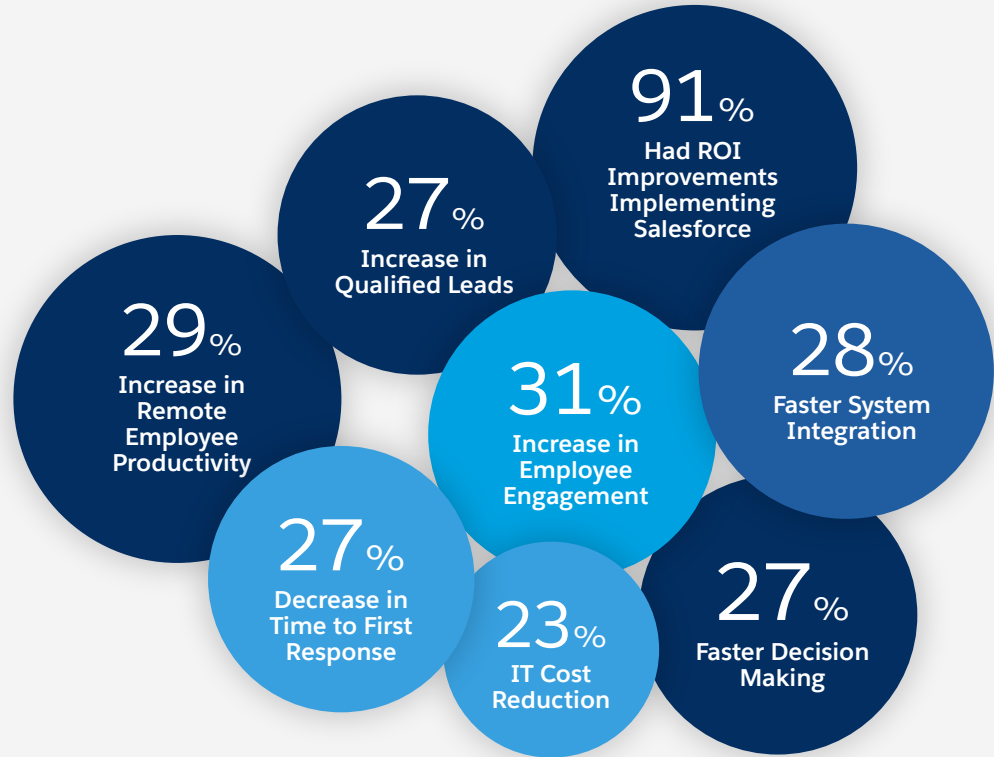


# Salesforce Business Value Benchmarks



## Sales Efficiency, Customer Experience, Employee Satisfaction & IT Efficiency

Benefit uplifts as reported from our Financial Services customers



# Retail Banking Customer Stories



Thank  
you

BLAZE  
YOUR  
TRAIL

salesforce

