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# Building Transformative Salesforce Solutions in the Financial Services Industry

*An Access Global Group Primer*



# The Promise of Salesforce for Financial Services

The unique challenges faced by firms throughout Financial Services create powerful **opportunities for technology solutions to drive tangible business value by creating a more agile, connected, and responsive organization.**

*At Access Global, we've seen this value up close.*

In this white paper, we'll examine the factors behind Salesforce's unique potential for the finance industry and analyze how key features can be leveraged through targeted customization to optimize core workflows in sales, marketing, and customer service—while providing an unprecedentedly robust analytics and reporting environment.

**Banks and other financial firms face large data-collection and analysis needs for lead generation, customer service, and sales.**

Data on a customer's income and credit history, for instance, needs to be on hand to do everything from targeting upselling opportunities, to answering customer questions about eligibility for new services, to contacting leads with relevant sales propositions.

Despite these needs, many finance firms are left with a convoluted toolkit of over-priced legacy infrastructure—while still relying overwhelmingly on manual data entry. Crucial sales data sits underutilized in Excel Spreadsheets. Sales and Customer Service reps are tasked with reams of manual data entry (a chronic source of human error)

**A Salesforce implementation purpose-built for Financial Services enterprises is the perfect catalyst for efficiently and effectively transitioning to a more efficient and effective approach.**

Thoughtful automation ensures that data is not only stored, but shared in real-time with sales reps, customer service teams, and the c-suite alike. Baked in real-time analytics take reporting time from days to minutes. And advanced CTI (Computer Telephony Integration) capabilities mean that voice-driven insights can be fully stored, categorized, and analyzed, bringing a crucial source of operational data into the fold.

Seamlessly navigating this transformation requires deep knowledge of the Salesforce platform – and an ability to customize it to reflect the needs of different financial firms.

**That's precisely what Access Global Group provides: hands-on consulting, implementation, staffing, and support services proven to deliver impactful Salesforce solutions for the Financial Services industry.**



# Goals for a Salesforce Transformation in Financial Services

While every financial institution is different, our hands-on experience leading Salesforce-based transformations for multiple large financial enterprises suggests that the same core functions are central to the needs of most organizations in this sector. **All of these functions share the same foundation: automatic classification and integration of vital customer data points across sales, service, and marketing, with generated insights automatically provided when and where they're needed most through a single, cloud-based UI.**

## Real-Time Analytics and Reporting

A well-crafted Salesforce implementation rationalizes reporting on performance and customer interactions, restructuring a sprawl of spreadsheets into a highly automated process within Salesforce. We have delivered solutions that have transformed reporting from a cumbersome manual process taking 24-72 hours to a truly real-time, data-rich intelligence source for operational managers and executives.

## De-Siloed Data for Integrated Operations

Data residing in different siloes throughout the organization can never reach its full potential. Comprehensive integration needs to empower users to ascertain key facts across all business units, communication streams, and time-frames—all from the same cloud-based interface.

## Superior Service

Automatically categorize incoming queries, ensuring that customers are paired with an accurate answer in the shortest amount of time possible—whether automatically or via a human rep. Automated classification and routing of service queries reduces time spent keying-in basic customer data or relaying basic answers—allowing human reps to focus on more nuanced cases that demand human attention.

## A Digital Nexus for Sales, Marketing, and Business Development

Exhaustive integration and powerful automation are the key to building a Salesforce implementation that's more than just supporting infrastructure.

### ***An impactful Salesforce solution should be:***

- 1. The prime originator for new sales, not just a contact database.***
- 2. Fully transparent to leadership through real-time dashboards.***
- 3. Fully connected across voice and digital communications.***
- 4. Packed with a full suite of lead management features.***
- 5. Capable of dynamic opportunity recognition.***



# Salesforce Solutions that Solve Chronic Financial Service Industry Problems

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## ◆ Dramatically Reduced Human Error in Data Entry

The financial service industry handles an extreme volume of data entry work, much of it vital information that needs to be entered with flawless precision. Even routine customer requests can lead to personnel filling out dozens of form entries—sometimes with data the company already has elsewhere in its systems.

Over-reliance on manual data entry is not only slow but creates a huge potential source for human error. **Thoughtful automation features—like automatically filling out basic information when already available, glean key data from telephone calls, and putting related info a single click away—save time while virtually eliminating human error in data entry.**

## A Streamlined Technology Toolkit

Finance firms often struggle to escape the orbit of outdated tools that nonetheless persist in niche financial applications. **Salesforce has all the tools needed to dramatically streamline the overall number of tools and licenses needed to support core business technology infrastructure, saving money and crucial IT work hours.** In some cases, we've been able to cut 50+ tools down to around 5. This streamlined IT portfolio helps eliminate reliance on proprietary plug-ins, reducing OPEX while simplifying administrative workflows.

## The Cloud Agility Advantage

As a cloud based-solution, Salesforce has the sort of operational agility finance firms need. New customer service or sales reps can be on boarded in minutes via a web portal login—a must for institutions that face large seasonal crunches or other short-term onboarding demands.

This cloud-based solution also bakes in full capabilities for remote work and disaster recovery—problems at physical locations don't have to be a "disaster" for sales and customer service, who can head home and log back in. These capabilities not only ensure a resilient customer-facing organization, but an unprecedentedly flexible, scalable sales and marketing operation.



# A Prototypical Salesforce Solution in Finance

- 1** High-level automation via keyword classification of incoming queries and other data sources, supplemented by human review. Phone calls can also be automatically reviewed for classification and assignment.
- 2** Assignment of incoming queries and data sources to relevant service and sales channels. Automated issue resolution for simple service and information requests.
- 3** Dynamic assistance: product recommendations for sales representatives, suggested resolutions for service issues, and upsell opportunity detection for existing customers based on custom criteria.
- 4** A comprehensive feature-set delivered through a unified UI: call recording, e-mail tracking, KPI reporting, and more: everything from strategic analytics to granular customer service data is instantly available wherever it is needed across the organization.

**Sales Cloud:** Lead Management, Opportunity Detection, Performance Tracking

**Service Cloud:** Automated Issue Classification, Real-time Resolution Tracking

**Marketing Cloud:** Lead Filtering, Contact Targeting Analysis, Full Support for Third-Party Data Sources

## Computer Telephony Integration

Phone calls are a fundamental medium for sales and customer service. But all too often, call data goes either entirely uncollected or is saved in a static form where it provides little analytical value.

CTI integration allows calls to be monitored, recorded, categorized, and analyzed through Salesforce.

## Exhaustive Integration and Customization is Key

Salesforce solutions in finance often need to be tightly integrated with other technology systems unique to the financial industry. An experienced Salesforce implementation team can efficiently deploy the targeted customization needed to ensure that all relevant financial data is fully integrated and available through the Salesforce UI.



# The Access Global Advantage

At Access Global, Salesforce is in our DNA—from the very top down. We're one of the only technology firms around with a veteran Salesforce Architect in the CEO role. A client-focused organization, we harness the power of the Salesforce platform through targeted customization tied to a detailed analysis of customer goals and budget.

We're true Salesforce specialists, with hard-won knowledge earned successfully delivering 100's of enterprise-scale solutions in industries ranging from finance to healthcare. From building ground-up Salesforce solutions for large organizations to overseeing overhauls (including upgrades to Salesforce Lightning) of existing deployments, we've done it all.

*Unlike giant, all-purpose consulting firms who bring massive teams to bear on every problem, we deliver tightly focused engagements with a cost structure closely aligned to our client's specific projects.*

**Our service offerings combine to ensure end-to-end support for Salesforce transformations in Financial Services, from initial conceptualization to on-demand support.**

- *Short and Long-Term Consulting: Leverage our knowledge to understand what a custom Salesforce implementation can do for your business.*
- *Implementation: we have all the resources needed to deliver custom, enterprise-grade Salesforce solutions at the "speed of business."*
- *Staff Augmentation: we know the market for Salesforce talent and can bolster your team with the specific hires you need to ensure lasting success.*
- *Support: dedicated admins with relevant technical certifications, on-demand.*



# Final Pitch



At Access Global, we're dedicated to helping our clients unlock the full potential of Salesforce through a solution that makes sense for the unique needs of their business.



We've seen the unique challenges faced by the finance industry up close. They can be solved—with the right tools.



To learn more about how a custom Salesforce solution can help you build an organization that's more analytical, more agile, more integrated, and more responsive to customers, get in touch with our team using one of the methods below.

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