



Customer Success Story



Customer Satisfaction Rating:

4.7

out of
5



Standard Bank LEADing the way

Capturing leads using Communities and Managing them with Salesforce



CUSTOMER OVERVIEW

Standard bank Wealth focus is on finding out what matters most to their customers, understanding the dreams, goals and ambitions they have for themselves and their families. They craft a financial plan that ensures that they are living their desired lifestyle and that the generational needs of their families are taken care of.

They curate the customers wealth journey by offering bundled products e.g Education cover, income protection, creating and building wealth by looking at the customer's current income, career goals, assets and more.

CUSTOMER COMPANY PROFILE

LOCATION:	Johannesburg, Gauteng, South Africa
EMPLOYEES:	# of Employees
INDUSTRY:	Financial Services
Solution(s):	Wealth Lead Management
GO LIVE DATE:	10/2019

Challenge

- When wealth sales squad host wealth products presentations to hundreds of customers and potential customers they used paper-based capturing of leads through forms that were filled by attendants to get an analysis of potential opportunities.

Solution

- Building an interactive web application using Salesforce Community cloud that had company branding and custom domain
- Using standard Communities templates and lightning components as well as creating custom Lightning Components to meet the business needs.
- Creating the Lead record , in the Lead object in Salesforce.
- Creating the Need Analysis record, in the Custom Need Analysis object in Salesforce.

Results

- Mobile and Desktop web application with a registration page and other pages that have needs analysis questions.
- Wealth squad members get a view of the products they can offer their existing and potential customers by analyzing customers answers.