

CASE STUDY

# Lightning Enablement

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Fortune 600 Regional Bank

A Top Tier Regional Bank with over 11,000 users faced increasing pressure to upgrade their CRM to **Lightning Experience** in order to support a growing customer base and higher demand for an Omni Channel experience.

The Salesforce Org was **highly customized** and but lacked connections across business areas. Any migration to the lightning platform would need to be carefully planned to support future **Omni Channel growth**, as it would have a ripple effect throughout their entire business.

- Provided holistic view of the Customer, further enhanced by **Financial Services Cloud implementation**.
- Higher accountability and engagement by providing bankers and management with easy-access Dashboards and reports
- Established foundational capabilities for creation Omni Channel Experience.
- Built Omni Channel enhancements on the Lightning Platform:
- Increased user adoption through more efficient lead and referral actions within Salesforce.
- **Re-designed business process** in a customer-first manner
- Increase referrals across lines of business to new products and improved customer relationships.
- **Deepening visibility into relationships** between the business and their customers.

