



# Renasant Bank



## Overview



Renasant Bank, a 115-year-old financial services institution which operates in more than 190 banking, mortgage, financial services and insurance offices in the Southeast. The mortgage division was seeking new solutions to its outdated CRM system including finding an efficient way to manage campaigns and track ROI. Renasant Bank required better data flow and lead routing capability to provide a unified system for their Loan Officers. They requested EMS to architect an integration to their Mortgage Loan Origination System, enhance their lead routing, and provide CTI phone integration capabilities.



## Goals

- ▶ Provide an end to end solution for the mortgage division
- ▶ Implemented knowledge, live agent, shield, MuleSoft and Pardot
- ▶ Configured lead to loan processes and standardize across all teams
- ▶ Eliminated time between point of sale and loan origination
- ▶ Manage all processes within the same platform for ease of use and transparency
- ▶ Automated data flow between mortgage origination and CRM
- ▶ Migration/integration of existing CRM platform, Top of Mind, with Salesforce Financial Services Cloud to maintain data within the new platform
- ▶ Integrated MortgageBot with Salesforce Financial Services Cloud to gain transparency and a single source of truth.



## Solutions & Key Integrations



Financial Services Cloud



MortgageBot via MuleSoft



Top of Mind



nCino



Pardot



MuleSoft Standup



## Results

- ▶ **Fully Integrated Salesforce:** Increased transparency and single source of truth
- ▶ **Unified Processes:** Across all lines of business to improve customer service
- ▶ **Successful Migration of CRM Data:** Create seamless implementation of FSC for all users.
- ▶ **Go Live of Retail and Consumer Direct Divisions**
- ▶ **Deploy Financial Services Cloud in Existing nCino Instance**

“EMS was a game-changer for us.”

Sarah Weber,  
Mortgage Sales Innovation & Marketing Manager, AVP