

Reimagine Customer Experience with the Pre-integrated SunTec and Salesforce Solution



Cloud Native | Cloud Agnostic

With customer expectations sky-rocketing, and digital disruptors waiting to claim a greater share of the market, it has never been more important for financial institutions to reimagine their value propositions. Gone are the days of pushing out one size-fits-all products and services. Today, it's about delivering hyper-personalized and engaging experiences centered on the customer.

This calls for an in-depth understanding of what customers want, when, and how. It requires sales and relationship managers to have real-time visibility into customer relationship, as well as relevant products and offers, so that they can design the best tailored solutions and deals.

However, this data is often scattered across enterprise silos, making it difficult to find and process. Sales and relationship managers end up having to constantly toggle between various systems which, in turn, hampers their efficiency and the quality of customer engagements.

The SunTec and Salesforce Joint Solution

Together, SunTec and Salesforce are helping banks and financial service institutions transform customer experiences, and accelerate productivity with real-time insights on customers, products, pricing, deals, and offers. The joint solution gives sales and relationship managers all the data they need at their fingertips to personalize services, add measurable value at each stage of the customer journey, and enable a new level of customer engagement.

The partnership brings together the world’s #1 relationship-based pricing platform with the world’s #1 CRM. Banks now have a single source of truth to work out the best pricing arrangements, cross-sell and upsell products that the customer actually want, and deliver personalized offers that strengthen customer loyalty.

Powerful dashboards and reports provide a dynamic view of projected revenues, as well as the ongoing performance of pricing and offers. These insights enable sales and relationship managers to make faster, better-informed decisions. The result? Better efficiency and agility in responding to customer needs, as well as higher customer satisfaction.



AIJ	HJI	WWE	PLD	EER	GRY	BPY
1,822	20,369	890	6,350	10,985	665	6,800
(-35)	(+580)	(-20)	(-200)	(+580)	(-15)	(-115)
MBC	LJH	MJB	PON	NFR	UGH	OMJ
3,605	9,562	2,609	7,654	6,522	1,632	3,652
(+210)	(-128)	(+35)	(+149)	(+122)	(-54)	(-184)
YBV	QMN	MMJ	ITJ	KLM	CCX	EMH
3,204	5,211	7,100	7,150	782	1,901	3,280
(+33)	(+154)	(-60)	(-150)	(+74)	(+101)	(-120)
MGR	WFF	HJM	QLC	LSD	SDH	GHS
3,500	712	134	2,022	631	6,287	12,630
(+20)	(+12)	(+5)	(-18)	(+40)	(-57)	(+320)



- **Enhance the customer experience:** Improve visibility into customers, their profiles, relationship with the bank, eligibility for personalized offers, and other information to deliver exceptional customer experiences. Easily manage new customer enrolments, deals, and commitments.
- **Improve team productivity:** Empower sales and relationship managers with all the information they need on products, services, offers, and eligibility criteria to negotiate pricing arrangements without having to toggle between multiple systems. Since the information is readily available and easily accessible through Salesforce, teams can effectively engage customers, while also enhancing upselling and crossselling.
- **Accelerate time-to-market:** Xelerate Product and Deal Pricing Solution is pre-integrated with Salesforce CRM, making it easy to configure and use. The solution adds to the arsenal of insights available to sales and relationship managers without disrupting the user experience. Ready-to-deploy adapters are available through Salesforce AppExchange.
- **Improve customer retention and acquisition:** Gain a complete view of available products, services, and offers to improve conversations with existing customers, as well as to convert new prospects and leads.

4X

Increase in Sales

3X

Increase in Customer Base

2X

Increase in Product to Customer Ratio

Months to Days

Launch New Offers

Enhance the Salesforce experience with Xelerate Product and Deal Pricing Solution:



Customer portfolio management

- Get easy access to customer relationship details, price plans, and revenue generated.



Product pricing and billing

- Enable a centralized view of products, services, associated fees, and account summaries.



Offer enrolment

- Track personalized offers subscribed to by each customer. Find all the information needed to enroll customers in new products and offers based on dynamic eligibility criteria.



Deal management

- Structure negotiated and personalized pricing contracts with customers and prospects. Easily onboard new customers.

Why Salesforce?

- Ranked #1 CRM provider by IDC for seven consecutive years (as of May 2020)
- Consistent, ground-breaking innovator with AI-powered, mobile-first, analytics-driven
- CRM Over 150,000 customers and 2.3 million+ Trailblazers
- More than 4,000 pre-integrated apps on AppExchange, the world's largest business app marketplace
- Proven ability to help customers sell faster and get more done through the Lightning Platform

Why SunTec?

- Pioneers in relationship-based pricing, offer, and deal management with a specific focus on the banking industry
- Over 130 leading banking customers around the globe
- A patented technology framework for banks to future-proof their technology investments
- Exceptional technology skills with in-depth domain and market understanding
- Proven experience in helping banks and financial institutions drive revenue growth with innovative pricing capabilities
- Value delivered to customers, including a 4x increase in deposit growth, 3x increase in customer base, and \$60 million reduction in revenue leakage

About SunTec

SunTec is the world's #1 relationship-based pricing and billing company. More than 130 clients in 45+ countries rely on SunTec to provide hyper-personalized products, offers, pricing, loyalty programs, tax compliance, and billing for over 400 million end-customers. SunTec products are based on our cloud-native and cloud-agnostic, API first, micro-services-based proprietary platform, Xelerate and are delivered on-premise, on private cloud and as SaaS. SunTec has global operations including the USA, UK, Germany, UAE, Singapore, Canada, Australia, and India. For more information, please visit us at www.suntecgroup.com or email us at marketing@suntecgroup.com

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