

Customer Story: Telhio Credit Union

Industry

Banking

Solutions

Custom Cloud, Sales Cloud, Chatter, CTI

Staff

200+ Employees

HQ Office

Columbus, OH

Telhio Credit Union has been a strong and stable financial institution in central Ohio since 1934. They are a not-for-profit, full-service financial institution cooperative, meaning all their members are owners and can expect to receive high-quality financial services to meet all of their needs.



Salesforce Challenges

- ⦿ The bank experienced rapid growth, especially over the past 6 years, and while security and infrastructure have kept up with this growth, the core systems have not.
- ⦿ No central/single source of truth – currently fragmented across 7+ systems including: Fiserv DNA, LOS, Meridian link, SageWorks, OnBase, Encompass.
- ⦿ Inability to develop comprehensive reporting and pipeline management due to fragmented data sources.
- ⦿ Fragmented client experience due to system fragmentation.

Access Global Group Solutions

- ⦿ Implemented the Commercial lending, Mortgage Application, and Consumer module of Financial Services cloud to enable a centralized/single source of truth of client information for Telhio staff to leverage.
- ⦿ Develop personalized customer journeys across email, mobile, advertising to deliver seamless experience across marketing and sales teams.
- ⦿ Enable data unification to allow for more seamless reporting, business process automation, and single centralized view of client information.

Salesforce Results

- ⦿ Telhio staff could now able to manage all client-related information in one place.
- ⦿ Follow-ups with clients are now automated in nature and are all systemic based on rules defined across the client lifecycle.
- ⦿ Mulesoft used for seamless reporting & data unification.
- ⦿ Customer journeys are now seamless and are no longer fragmented in nature, building upon notes and client activity that takes place in FSC.
- ⦿ Synced customer data now helps the sales team upsell related products to customers!