

# Customer Story: Cadence Bank

**Industry**  
Banking

**Solutions**  
Custom, Chatter, Integration

**Staff**  
18,000+ Employees

**HQ Office**  
Atlanta, Georgia

Cadence Bank (formerly State Bank & Trust) is a regional bank with 98 branches in Texas, Georgia, Florida, Alabama, Mississippi and Tennessee covering commercial, business and personal banking services.



## Salesforce Challenges

Over the last three years, Cadence Bank experienced rapid growth, acquiring 12 banks in 3 years. They desperately needed support for these acquisitions, which included merging systems and the need to develop a more efficient way to communicate with their company of 1800+ employees. While Cadence Bank did have lead and opportunity management systems, they were not integrated with customer master data systems, giving employees an incomplete representation of information. Further, they did not have Computer Telephony Integration (CTI) which resulted in increased call handling times and significant limitations for call centers during peak seasons. Other problems faced by Cadence Bank included challenges integrating with legacy financial systems, no unique serialization for accounts across all 12 banks acquired, and inefficient uses of time as a result of manual systems, management and reporting.

## Access Global Group Solutions

Access Global Group implemented CTI using AM adapters & Cisco backend, as well as setting up Chatter & Files for internal communication & file storage. In doing so, this eliminated critical gaps in communication throughout the team and significantly improved their online and digital presence. Not only did AGG integrate Salesforce with over 20 legacy systems, but we also built custom integrations with IBM mainframes and Jack Henry (Financial) systems to sync data into Salesforce. This allowed sales reps to use integrations to upsell/cross-sell related products. The most important thing we wanted to achieve was creating a system that worked with Cadence Bank rather than against them, thus, we curated custom system configurations, automated key work and approval processes and enabled real-time integrations to core banking and digital banking systems to provide critical data forecasts. And because we know that companies need to have the agility to transform their business quickly, we implemented a structure for CSR to work remotely from home in peak seasons. This allows the Cadence Bank team to continue providing superior customer sales support and manage accounts with ease.

## Salesforce Results

Cadence Bank employees are now able to collaborate and share vital information with ease via Chatter capabilities. Call handling times have significantly decreased as calls can be made directly from Salesforce and activities are auto-logged. Sales reps are now able to manage all sales-related information in one place and synced customer data helps the sales team upsell related products to customers. By implementing AMC/Cisco telecom system integrations, it resolved **99%** of Cadence Bank's limitations during peak seasons and allowed remote work a possibility. Overall, data transparency and efficiency was achieved with Salesforce solutions, helping Cadence Bank to increase ROI by **18%** and call center KPIs by **25%**. In the end, Cadence Bank saw significant simplifications with their commercial, wholesale, retail, and investment banking processes.