

Customer Success Story

Customer 360 across Salesforce



Stearns Financial Services is a multi-billion dollar well-capitalized, independent financial holding company. Stearns specializes in nationwide small business lending and equipment financing. Fostering helped to further enable *excellent customer service* and *fast loan decisions* with a 300+ Salesforce user implementation, **document collection customer portal**, unified customer data with their equipment finance company, and numerous integrated apps to streamline processes.

Sales & Service Clouds

- Increased loan volume by 2x
- Increased Relationship impact with 360 view

Borrower Document Collection Checklist Experience Cloud

- Save 10x time
- Freed up 12 FTE's

Customer Success Story



Increased Upsells 50%+

Northland Capital had an existing strong pipeline of new deals. However, current lessors were not being connected with and customer churn was higher than desired.

Northland partners with Fostering to create a call list of existing or previous lessors and a screenflow wizard to reconnect and offer incentives for new leases.

This enabled their Sales team to reconnect with all their existing and previous customers to offer incentives for their next lease! Quickly, efficiently and accountable.

Sales & Service Clouds

- Reduced Curn
- Increased Sales Revenue

Partnered with Northtec

- Loan Origination on Salesforce

Customer Success Story



Simplify Administration and Increase User Adoption

“Our organization was struggling to gain user adoption of Salesforce Financial Services Cloud. We brought on Fostering to help **evaluate our environment setup** and **make recommendations for increasing our adoption**. Fostering identified a significant amount of customizations to profiles and permission sets and helped us clean that up and simplify based on the size and use cases associated with our implementation. By simplifying the setup, **we simplified the maintenance and support**, while also enabling our apps to operate more consistently across business lines.”

- Chris Kempf, Salesforce Product Owner, Bremer Bank

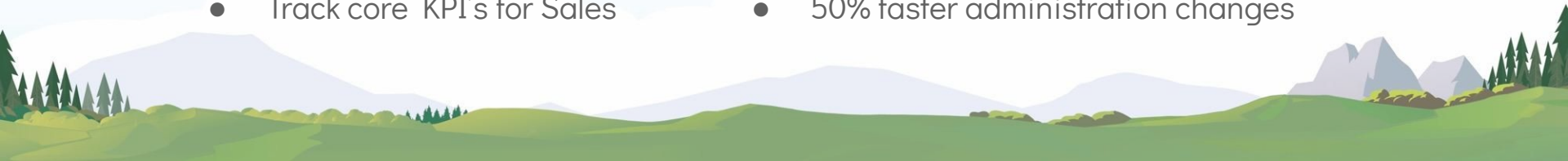
Bremer Bank is a \$16 billion dollar bank with 1,400+ employees utilizing Sales Service Cloud.

Increased Adoption

- From 100 to 300 users
- Track core KPI's for Sales

Simplified Administration

- Consolidated 20+ record types and 20+ layouts
- 50% faster administration changes



Customer Success Story

Revive, Support, and Provide Value



MIDWEST FINANCIAL PARTNERS

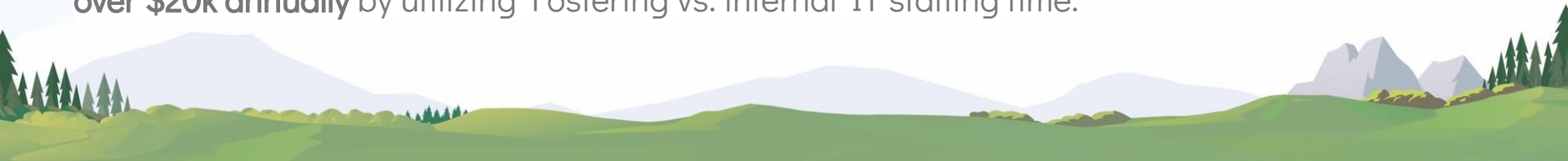


Midwest Financial Partners offers Investment, Insurance, and Tax services to their clients. For years they had a part-time IT/Salesforce Admin that struggled to keep up with administration and ongoing feature enhancements, even though they had Premier Support.

Their executive team questions the ROI on their Salesforce investment and were ready to cancel their contract. They reached out to Fostering for second opinion,

Fostering engaged to provide an org review, dirty data cleanup services, create automation for their tax preparation department, and provide professional ongoing services.

They **now see ROI** and have a roadmap for continuing their Salesforce Investment and **save over \$20k annually** by utilizing Fostering vs. internal IT staffing time.



Customer Success Story



Increase Visibility and Sales

Falcon National Bank delivers on “Service that Soars Above the Rest” and specializes in Business Banking (including SBA Lending and Equipment Financing) and Retail Banking. With a growing business and increased staffing, Falcon needed a CRM solution that would help them *scale and continue to serve their clients at this high level.*

Fostering implemented **Sales Cloud** for their Business Development, Equipment Finance, Credit and HSA teams. Falcon now has a platform to take that Soaring to a whole new level.

Business Banking

- Increase loan visibility
- Credit processing

Equipment Finance

- Dealer Online Loan Applications
- Document Generation
- Automated Upsell Generation

