Nest! BANK

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is the first bank in Poland to implement and launch Marketing Cloud from Salesforce.

Nest Bank S.A. – a universal bank operating in Poland, founded in 1995 as Westdeutsche Landesbank Polska SA, targeting individual and business customers. Currently, the number of the bank's clients amounts to 100 000.

# CHALLENGES NEST BANK WAS FACING IN EVERYDAY WORK:

\# **inconsistency in marketing communications** with customer data;

\# **ineffective communication with customers**, not adjusted to their needs and budgets;

\# **lack of multi-channel communication** across the customer journey;

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**no single source of truth –** all information kept in different Excel files;

lack of **a centralized reporting tool;**

**no consistent processes** across all departments;

lack of **internal communication;**

business decisions **based on gut feeling** rather than insights from data;
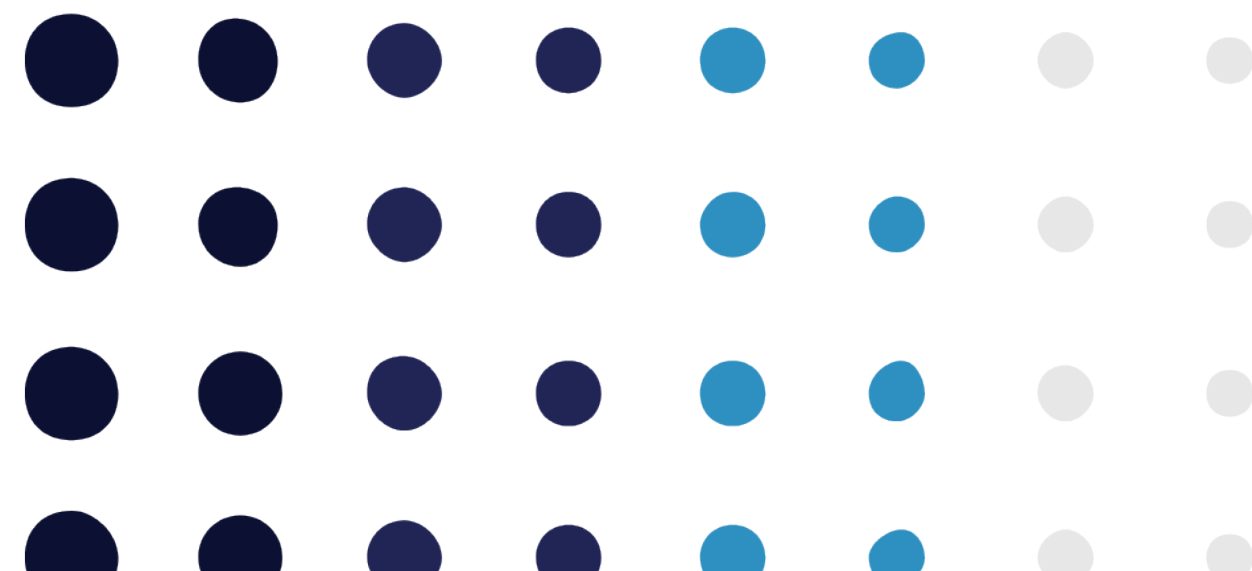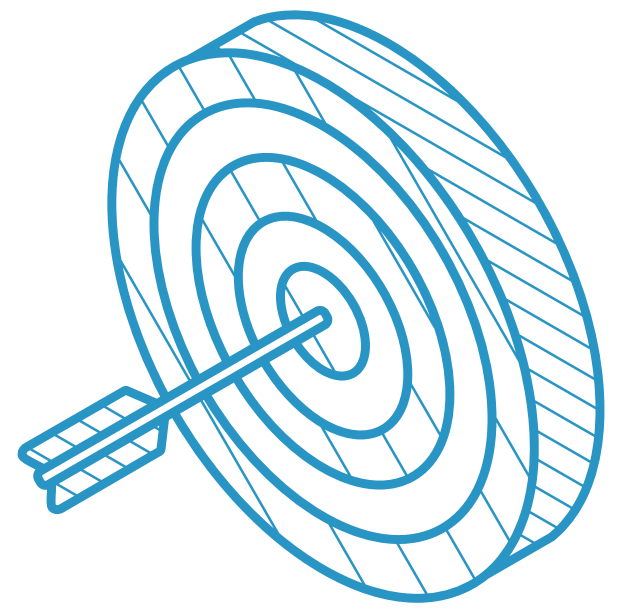
PROJECT SCOPE INCLUDED:

Salesforce Marketing Cloud implementation:

- **sending personalized communications that are fully responsive to customer needs,** delivered through the customer's most preferred communication channel and at the right time;

- **creating complex segmentation based on customer preferences**;

- **customer journey**, which, regardless of the communication channel, **enables precise and consistent shaping of the offer** for particular customers on the basis of previous customer segmentation;

- **ready-to-use email templates built into the system;**
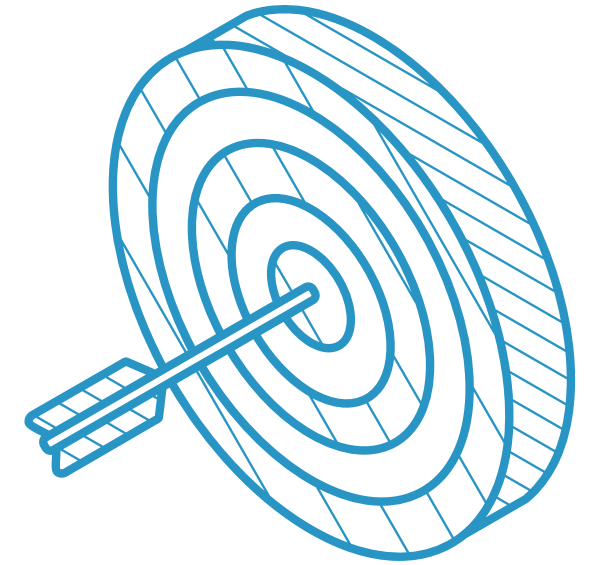
Salesforce Service Cloud implementation:

- **simultaneous integration of Service Cloud with internal banking system and Marketing Cloud;**

- **data from the banking system about customers,** companies, and their products flows to Service Cloud and then to Marketing Cloud;

- **Marketing Cloud uses only the data about clients** which are necessary to build personalized marketing communication;

as well as:

- **training the team** on how to use Marketing Cloud and Service Cloud in the context of their products.

KEY BENEFITS FOR NEST BANK:

\# **possibility to effectively use the collected data in marketing activities**;

\# **one powerful tool to manage communications** with prospects and customers **in a personalized and engaging way;**

\# communication delivered through the **customer's preferred channel and at the right time;**

\# **segmentation based on an up-to-date**, integrated and complete database of customers and their preferences;

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**the ability to get to know customers better, understand their real needs**, and translate that knowledge into optimal banking solutions;

**saving time and streamlining the work of sales and marketing departments;**

**easier building of communication** – e-mail/SMS templates embedded in the system, consistent with the identity of the bank;

**bank of assets built into the system** – no need to use graphic services as all icons and images are already stored in the system.