TECHNOLOGY SERVICES

FINANCIAL SERVICES
CLOUD ACCELERATOR

The FSC Accelerator is a configuration toolset specifically designed to reduce the overall deployment time for Salesforce Financial Service Cloud. Based on best practices and industry expertise, the Accelerator provides the following additional configuration options:

USABILITY FEATURES

- **Update Household Member Addresses when the household address changes**
- **Standardize Household Naming Convention** (i.e. Smith, Matt & Jane)
- **Enhanced Lead Conversion for Person Accounts:** When using person accounts, we create a Primary Person Account record, secondary record (if applicable) and Household record, and create the relationships between them, when the lead is converted.
- **Page Layout Standardization:** We have standardized all of the page layouts, activity layouts, compact layouts, buttons, etc. to both make it easier to navigate and reduce the number of clicks required.
- **FSC Training Videos/Documentation:** We provide fourteen (14) short videos to educate our clients as to how FSC is designed and how it works. This includes training on the household model, Reciprocal Roles and how to relate records to other records.
- **Task Rollup:** We provide functionality to rollup tasks from the household members to the Household.

CLIENT SERVICING FEATURES

- **Update Last Interaction and Last Contact Dates on Household Record:** Both fields will be automatically updated to reflect when the last Interaction/Meeting took place as well as when the last phone call, email, etc. took place.
- **Track Client Service Activities:** Based on the data tracked by past clients, we have pre-built Service Record Types to capture data on the following. Because every organization has a different process, we will leverage these service types while building out your processes.

  - Client Onboarding
  - Client Passing
  - New Financial Account
  - Client Offboarding
  - Money Movement
  - Address Change
  - Operations Request

- **Interaction/Interaction Summary Enhancements:** With FSC having a separate area to track client meetings, we have built functionality that will synchronize these meetings with the Salesforce calendar to keep all the dates in synch.
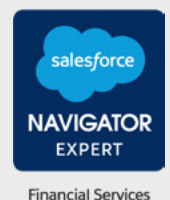
COMPLIANCE FEATURES

- **Errors & Omissions:** Track this data and associate it to your clients and their financial accounts.
- **Investment Policy Statements:** Track the client's objectives for each financial account and have it visible at both the financial account and client record.
- **Non-Cash Compensation:** Track all non-cash compensation that you have provided to your client.

Note: This Accelerator was designed to run on FSC Enterprise Edition and some of this functionality will not be available on FSC Professional Edition. The Accelerator is a set of advanced deployment tools and have been designed to improve the overall user experience of FSC customers as part of your initial implementation. Any changes made to the client configuration or updates to the Salesforce platform after the Accelerator has been deployed may require modifications to your Salesforce org at an additional cost.

The details of your Sikich Statement of Work will define what is being implemented. For example, you may not be building out any of your business processes in Phase I even though the Case record types will be installed in your Salesforce environment for future use.

EXPERTISE

- Over 450 Salesforce implementations for RIAs
- We build a long-term strategy/Salesforce roadmap for our clients

- Built two Insurance Agency Apps on Salesforce Platform
- Providing expertise and best practices in the Financial Services market

- Built a cost-effective Core Banking batch Integration engine
- Significant experience in deploying the Financial Services Cloud

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EXPERT

Financial Services