CLIENT SUCCESS STORY

$2.25B Community Bank

Deploying a Multi-Year Salesforce FSC and MuleSoft Transformation to Establish a Real-Time Customer 360 for a $2.25 Billion Community Bank

340%	93%	50%	95%
ROI Within 18 Months	Manual Data Entry Reduction	Processing Time Reduction	Client Retention Rate

THE CHALLENGE

The client is a prominent community banking institution headquartered in the Pacific Northwest, managing over $2.25 billion in total assets across 12 full-service branches.

Prior to 2021, the bank's technology landscape was characterized by heavily siloed, independently developed applications generating substantial technical debt. Core banking functions were split across Fiserv Cleartouch and FPS Gold. Commercial lending relied on Wolters Kluwer CASH Suite and Pipedrive, while customer support ran through ZenDesk. Bank employees were forced to alternate between multiple interfaces to complete routine servicing tasks, significantly increasing manual data entry errors and delaying service delivery. The reliance on disjointed platforms resulted in exceptionally high annual recurring software costs, elevated training overhead, and an inherently fragmented customer experience. Leadership had no unified view of the customer relationship—forcing community members to repeat their financial narratives to different tellers.

THE VANTAGE POINT SOLUTION

Vantage Point architected and delivered a multi-year, wall-to-wall implementation of Salesforce Financial Services Cloud and MuleSoft, systematically dismantling data silos and establishing an authentic, real-time Customer 360. Utilizing a phased “Crawl, Walk, Run” deployment methodology, we delivered across three major phases:

Phase 1: Foundation (Crawl) Established the baseline Customer 360 data model for the Customer Support Center.Centralized case management, integrated telephony (Masergy) and digital chat (LivePerson) into the CRM console. Executed mass data migration of 63,588 customer records via MuleSoft with near-perfect fidelity. Deployed to 88 active, fully trained users.

Phase 2: Optimization (Walk) Expanded Salesforce into Retail Banking, Mortgage Lending, Commercial Lending, and Investments. Engineered bi-directional MuleSoft integrations with MeridianLink LoansPQ (consumer loan origination), Blend and Ellie Mae Encompass (mortgage), Abrigo Sageworks (commercial), and Fiserv Cards for real-time debit card management directly from the Salesforce console.

Phase 3: Iteration (Run) Architected replacement APIs for the enterprise-wide migration from FPS Gold to Jack Henry banking platform. The decoupled Salesforce-MuleSoft architecture insulated the frontline user experience during the core transition. Roadmap includes Pipedrive deprecation, Fiserv FCRM for BSA/AML analytics, and Salesforce Agentforce exploration.

WORKFLOW AUTOMATION

Engineered an intelligent Referral Round Robin system with geographic routing and 12-hour escalation timers, eliminating dropped leads across the retail footprint. Built highly sophisticated case flows accommodating 32 distinct loan servicing case types. Deployed dynamic sales goal dashboards with daily MuleSoft data ingestion from ProLog, providing branch managers with real-time performance visibility against organizational targets. Automated Enterprise Risk Management compliance tracking, achieving a 30% reduction in manual reporting hours and 100% on-time regulatory filing submission.

WORKFLOW AUTOMATION

METRIC	BEFORE	AFTER VP DEPLOYMENT
System Architecture	Fiserv + FPS Gold + Pipedrive + ZenDesk silos	**Unified Salesforce FSC + MuleSoft ecosystem**
Manual Data Entry	Constant re-keying across platforms	**93% reduction in manual data entry**
Processing Time	Manual loan origination and servicing	**50% overall reduction in processing time**
Client Onboarding	Fragmented, multi-system process	**60–75% faster onboarding velocity**
Compliance Reporting	Manual audit prep across silos	**30% reduction; 100% on-time regulatory filings**
Administrative Tasks	High overhead from disconnected tools	**27% decrease in administrative tasks**
Customer Satisfaction	Fragmented, inconsistent experience	**4.71/5.0 CSAT; 95% client retention**

TECHNOLOGY STACK

- Salesforce Financial Services Cloud
- MuleSoft (Enterprise Service Bus)
- Fiserv Cleartouch (Core Banking)
- FPS Gold ® Jack Henry (Core Migration)
- MeridianLink LoansPQ (Consumer Loans)
- Blend + Ellie Mae Encompass (Mortgage)
- Abrigo Sageworks (Commercial Lending)
- Fiserv Cards (Debit Card Management)
- Masergy (Telephony / CTI)
- LivePerson (Digital Chat)
- Terafina / NCR (Account Opening)
- MS Outlook / O365 Integration

CLIENT TESTIMONY

"Vantage Point didn't just implement software—they engineered a scalable architecture that let us integrate 17 acquisitions without breaking stride. The system pays for itself every quarter in advisor time reclaimed."

— Operations Leadership

WHY VANTAGE POINT

Vantage Point is a Salesforce Consulting Partner focused exclusively on financial services. Our 100% senior-level, US-based delivery team brings 150+ years of combined industry experience across wealth management, banking, insurance, fintech, and mortgage lending. With 400+ engagements, 150+ clients, a 95% retention rate, and a 4.71/5.0 satisfaction score, we deliver measurable results—not just implementations.

Ready to scale your wealth management technology?

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