



Salesforce Financial Services Cloud for Retail Banking

With the release of Financial Services Cloud for Retail Banking, Salesforce has uniquely positioned themselves at the forefront of the industry's transition from traditional product-driven institutions to an industry that is relationship driven and customer focused with a keen eye on omnichannel.

Financial Services Cloud provides banks with proven best practices with customer relationship management capabilities including campaign management, customer segmentation and householding, seamless cross-sell intelligence with leads and referrals, a system of engagement to support internal sales management processes for pipeline tracking, and actionable data with measurable outcomes that provide insights that have historically eluded banks due to numerous disparate systems making the use of data an insurmountable task.

Silverline, as a Platinum Partner of Salesforce, comes to the table fully prepared to assist you with many years of industry experience focused on providing banks with solutions on the Salesforce platform that have been leading this call for change. We are an industry-focused, relationship partner that prides ourselves on your success.

"Our teams are excited to continue to bring a proven best practices approach to you with the latest updates to Financial Services Cloud."

Pam Hannett, Silverline Practice Director,
Banking & Wealth Management

About Financial Services Cloud for Retail Banking

Financial Services Cloud is Salesforce's most dominant industry solution in their industry product portfolio. Financial Services Cloud for Retail Banking inherits a combination of both Sales & Service Cloud with net new banking features enhancing the current wealth management feature set. This product clearly depicts Salesforce's understanding of best practices in banking by enabling customers to utilize preconfigured functionality with a full CRM foundation focused on intelligent needs based selling and service automation to change the consumer digital banking experience.

How is this different from just Salesforce for Banking?

The difference is one of preference, build or buy. Having a product with a roadmap for future development, upgrades, and feature releases vs. being fully responsible for continued innovation of the Platform with the addition of new features and functionality. Buying Financial Services Cloud provides the bank the ability to seamlessly rollout future enhancements to continually build upon functionality as the industry changes that come with the Salesforce platform release experience based on their constant improvement and industry perspective.

Where Silverline Fits In

As a certified Salesforce Fullforce Master in Financial Services, Silverline has proven expertise delivering implementations and customized solutions in the banking industry and beyond. Over the years, Silverline has built and distributed industry accelerators within the Financial Services ecosystem to solve industry challenges with best practice solutions delivered and customized for banks. Silverline has unparalleled customer satisfaction, has delivered over 1,100 deployments, and leverages highly certified industry-focused resources that work with you to ensure measurable success.

We understand banks...

Our experts, with over 30 years of actual on the ground industry experience, have compiled best practices from the experiences garnered in over 200 financial services clients, from these, we have identified supporting best practice capabilities to further extend Financial Services Cloud for Retail Banking.



Intelligent Cross-Selling

Surface actionable data from the integration of core banking, loan origination, and divisional core systems (ie Insurance, Wealth) into Salesforce to provide targeted suggestions to customers to sell the right product or service to the right customer at the right time for the right reason. This can provide the ability to create progressive, forward-thinking push marketing campaigns.



Product Analysis

Feature dashboards and reports that provide internal product managers and executives with the ability to measure the viability of the bank's products and services based on consumer cross-sell behavior patterns.



Household Automation

Based on key requirements defined by the institution, households can be generated automatically. Historically, banks have questioned how MCIF providers' define a household, how and when a household is created or dissolved. Automating the householding process can provide an institution the ability to measure product per household, services per household, new households by branch, and much more.



Dispute Management

Manage Regulation E and Regulation Z disputes from within Salesforce. Use Salesforce Cases, integration, and Lighting Components to provide multi-channel support and support processes to manage the entire lifecycle related to customer disputes.



Templated Core Banking Integrations

Based on set requirements, Silverline's solutions with core banking integrations provides a template for extracting files from the core banking system as well as the mapping to the Informatica ETL tool to perform batch integration to Salesforce. Integration reinforces the ability to have actionable data to provide insight into customer's buying behaviors as well as speed to report on operational efficiencies in the front and back office.



Learn More

If you are interested in learning more about capabilities to extend Financial Services Cloud, assistance deploying Salesforce functionality, or would like pricing information, please start a conversation with us at financialservices@silverlinecrm.com.

About Silverline

Silverline's results-driven methodology leverages best practices acquired by over 1,100 implementations, with significant expertise in Financial Services including banks and credit unions; mortgage companies; wealth management firms; investment banks; hedge funds; and insurance companies. If you are interested in more information, please contact financialservices@silverlinecrm.com.

