

# Banking Foundation for Financial Services Cloud

## A solution to transform your bank, delight your customers, and empower your employees with the power of FSC.

Banks and credit unions are facing shifting customer preferences and the realization that experience matters more than ever before. You need to be able to offer insightful interactions, reduce friction, and drive seamless experiences throughout the customer lifecycle by leveraging data. Ultimately, you need to evolve with expectations and deliver personalized experiences that meet specific needs.

Silverline has worked with Salesforce Financial Services Cloud (FSC) from its inception. As an initial FSC launch partner, we have a deep understanding of the capabilities of the application and how it can be leveraged to deliver a unified customer experience across a bank's multiple lines of business. We leverage our deep industry expertise and strong partnership with Salesforce to leverage all the features included with FSC and expand what you can do with Silverline-developed accelerators.

In our experience, banks and credit unions need to solve for:

- Increasing share of customers' wallet through intelligent cross-sell and up-sell recommendations
- Providing customers with the personalized experience they expect
- Breaking down the data and process silos between their different lines of business
- Enabling bankers to serve their customers wherever they are

We have created our foundational solution for banks, credit unions, and non-bank lenders as a pre-defined approach to reduce your implementation time for Salesforce FSC. This accelerated timeline allows you to deliver the customer experience your customers expect and realize a quick return on your investment.

## What do you get with Silverline's Banking Foundation for FSC?

- Enterprise-wide view of customer data leveraging the industry standard FSC data model
- Boost employee productivity with banker consoles customized for each line of business
- Common sales and service processes across all your lines of business
- Enterprise referral tool to easily submit and track referrals from internal sources and external sources (Centers of Influence) with Opportunity attribution, conversion, and quality metrics
- Seamless integration with your core bank system to deliver customer demographic and financial data at the client and household level
- Customer service transformation through case management with automated distribution and workflow and configurable SLAs
- Scalable technical and functional foundation based on reference architectures, reusable data models, and accelerator components built from our industry experience

With FSC, client satisfaction increases 41%\*

\*Source: Salesforce, Financial Services Cloud Survey



No matter where banks or credit unions are on their transformation journey, we can help them find areas that present the greatest opportunity to drive outcomes for their organizations and engage their customers in any manner they choose. This requires digital tools that enable access and capabilities, as well as intelligent interactions that reduce friction and drive seamless experiences. Financial institutions need to grow with their customers and deliver personalized experiences that meet their unique needs.

**JP Owens**, *Director of Banking and Lending at Silverline*





With Salesforce's flexibility, Silverline was able to customize the platform to fit how we do business. We capture how our most successful employees do business and model that process for success with technology. Silverline, Salesforce, and our business model for success are a winning combination.

**Anna Berlekamp**, AVP Workplace Banking, Paducah Bank



## Featured banking accelerators



### Branch Management

Enables your tellers and universal bankers who work across multiple branches to instantly switch their location for updated information for that particular branch, easily be added to branch-specific case queues, and ensure the proper branch is associated with important KPI data tracking.



### Activity Reports

Enables enhanced collaboration by allowing you to relate multiple records and multiple meeting note contributors; so you can handle an advanced workflow that is not possible in native Activities.



### Quick Referral Create Flow for FSC

Enables your users to easily add a referral for a client or prospect right from the contact record and only be asked for the most important information, eliminating clicks and data entry.

Silverline has established an internal Foundry, which is a team dedicated to creating accelerators that combine our industry consulting expertise with product management excellence to create greater value and drive faster innovation on the Salesforce platform. Our Foundry team has built over 175 robust accelerators, apps, & Lightning components including more than 40 which are Banking specific.

## What's next?

After an implementation using our foundational approach, banks can expect to realize a lift in revenue and an increase in client satisfaction. In order to build on that success and maximize the investment in Salesforce, many of our clients extend their capabilities with roadmap items that include:

- Marketing automation to provide enterprise visibility for new customer onboarding interactions, new account opening communications, client retention campaigns, multi-channel journeys
- Self-service and call deflection through customer communities
- Streamlined appointment scheduling
- Chat, chatbots, and other multi-channel engagement platforms
- Real-time integrations to core and other bank systems to further eliminate rekeying of data
- Identify next best actions and offers based on your customer data and present to bankers or directly to customers
- Computer Telephony Integration (CTI) to enable screen-pops and click-to-dial for call center efficiency

Silverline's Banking Foundation for FSC will give your financial institution the right start to your Salesforce journey. When it comes to banking digital transformation, Silverline is a partner that combines over a decade of experience with Salesforce implementations with extensive knowledge of your industry and processes.

## About Silverline

Silverline has real-world expertise in the Financial Services industry, including banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies. We combine strategic planning, implementation, and ongoing support to help clients realize continuous value with the Salesforce platform. To find out more, contact us at [financialservices@silverlinecrm.com](mailto:financialservices@silverlinecrm.com).



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Leveraging FSC in  
your lending process  
results in a **34%**  
**increase in sales  
productivity\***

\* Source: Salesforce, 2019 Financial Services  
Customer Success Metrics

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