

# Improved Customer Experience Solution for a Global Financial Services Firm

StoneX is a global financial services firm with offices throughout the world, including significant presence in the US, UK, Brazil, and Australia. They provide, among other services, clearing and execution, risk management, and physical trading in commodities and currencies. Their 300+ broker/consultants serve a diverse customer base that includes producers, processors and end users of virtually every major traded commodity; commercial counter-parties; governmental, non-governmental and charitable organizations; institutional investors; brokers; professional traders; commercial banks; and major investment banks.

## Changing the customer experience

StoneX uses Salesforce internally and has an external-facing portal with limited capabilities. However, with the changing market conditions and evolving customer expectations, they lacked a robust single point of entry for their customers to use and self service. Over the last two years, their business and technology executives have reimagined the future of their customer experience through a confidential internal project. This firm-wide initiative had three major goals:

- To grow customer loyalty and scale the white-glove service they provide for their middle-market customer base
- To provide these customers self-service direct access to real-time data about their portfolio and holdings
- To lay the foundation for future premium content such as research, executive conferences, and more.

## Strategic solutions

StoneX, in partnership with Silverline's UI/UX expertise, successfully transformed their Salesforce environment to the full Lightning Experience as the first step toward accomplishing these goals. Silverline worked to jointly define key internal and customer personas and optimize their workflows for maximum productivity. We also began a proof-of-concept project to design their Customer Community and Integration Strategy that would power the confidential project, which upon success would be released to the greater public for use.

## Results


Silverline designed and built API-driven real-time integration to dozens of trading systems that would become the big data backbone for their institutional customers. Silverline also built the necessary integrations to the content management systems that power the client's industry-leading Market Intelligence insights.

These integrations now provide customers direct access to their Pre-Trade market insights, which helps them to make informed trading decisions, as well as their Post-Trade data about their portfolio exposure margins and statements — and provide tools to execute trades and manage critical details of their institutional accounts.


This has resulted in more efficient service processes for the client, increased agency for their own clients to manage their accounts, an increase in trade volume, and more exposure to the premium Market Analysis commentary the firm publishes.

## About Silverline

With significant expertise in the Financial Services industry, including banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies, Silverline combines Strategic Advisory, technical implementation, and ongoing Managed Services to enable organizations to achieve maximum value with the Salesforce platform. To find out more and get pricing information, contact us at [financialservices@silverlinecrm.com](mailto:financialservices@silverlinecrm.com).

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