

How Westfield Bank Aligns Sales and Marketing with Salesforce

Westfield Bank provides relationship-based banking services for businesses and individuals across northeast Ohio and to independent insurance agencies across the country. Customers look to Westfield Bank for personal service, local decision-making, and the convenience of online banking anytime and anywhere. Since 2009, BauerFinancial has awarded Westfield Bank its 5-Star (Superior) rating, designating it as one of the top financial institutions in the country.



Westfield Bank's vision is to create a better community bank. As a small but mighty regional bank, they can move faster and be more flexible, delivering personalized financial services at lower costs. But they needed a CRM that would help them compete with larger institutions in the same marketplaces, one that would refine operations and help them create deeper relationships with customers.

The challenge: Integrating disparate data systems into one platform

To deliver that personalized, flexible service to their customers, Westfield Bank needed a 360-degree view of those customers. But using multiple systems that weren't integrated and individually provided minimal visibility made that difficult as they grew.

That's why Westfield Bank connected with Silverline. After trying various CRM options in the past, Westfield Bank needed a platform that could bring all their data together and help them make the best use of it.

"Some of the other solutions that we've used didn't integrate with any of our systems, so that created a challenge because we had dated and duplicate information and didn't really have a great way to centralize all of our conversations," said Matt Berthold, Chief Operating Officer at Westfield Bank. "You'd have to go to several different systems to be able to get a sense for where the customer's at on the journey. Having everything together in the same system is incredibly ideal for us."

Salesforce offered enhanced capabilities that were scalable for Westfield Bank's size and offered plenty of room for growth. Having already implemented nCino as their loan origination system, Westfield Bank had a baseline familiarity with the Salesforce platform, but now they were ready to implement Financial Service Cloud, High Velocity Sales, and Marketing Cloud, which would drastically transform their sales and marketing processes.

"We have a unique opportunity here at Westfield Bank," said Chris Van Ausdale, Senior Vice President, Marketing Leader at Westfield Bank. "Marketing and sales are very well integrated and work well together. Salesforce really gave us the opportunity to link sales, marketing, and the robust customer data that we have to really improve our marketing campaigns." With Marketing Cloud, Van Ausdale's team can build custom customer and prospect journeys, and give insight into those communications to the sales team, enabling them to have more informed conversations.

"How do we use data to inform the marketing that we do right now?" said Van Ausdale. "Not only targeted messaging, but also understanding the performance of campaigns to continually make updates and improve the results of our campaigns."

Westfield Bank's sales team had recently gone through its own journey to mature their sales process and create more consistency in how they sell. Salesforce's High Velocity Sales gives them tools to make connections with customers, determine what they want, and remove the obstacles on the way to the sale. "It became clear that they had a solution that could help us manage the selling process as well, not only from the standpoint of teaching the sales team, but also help facilitate that by using automation and Salesforce capability," said Berthold.

With Financial Services Cloud, Westfield Bank gains a consolidated 360-degree view of customers, financial accounts, and relationships, making it easier to manage their sales pipeline and referral and cross-sell opportunities. Activity is tracked within the system so everyone can see where and how customers are engaged on their journey, and built-in artificial intelligence mines this mountain of data for insights to help keep customers satisfied.



Harnessing the power of sales and marketing alignment

“From a marketing perspective, we’re always thinking about what the next best action is for our customers,” said Van Ausdale. With Marketing Cloud’s householding capabilities, the marketing team can understand the full relationship they have with a customer and pinpoint the next best action opportunities. By being thoughtful about how they approach customers, they can deepen relationships and prevent customer attrition.

The 15-week implementation came in under budget without any disruption to the business or existing nCino environment, and Westfield Bank plans to use Salesforce to support retail banking and service functions.

“The potential is the insight into all of the communications that we’re sending out to customers, and having the exact same sales process for consistency when we’re looking at not only deepening existing relationships, but bringing on new ones,” said Van Ausdale. “Further, our sales leaders gain insights to understand what their team is doing to stay on top of things. We’re looking at new opportunities for prospecting that would deliver leads straight to Salesforce. Not only the automation of delivering the leads but being able to report on that will help our prospecting sales process.”

Enthusiasm for the new platform goes beyond each department, and the entire organization sees how Salesforce is a game-changer for their operations. “It’d be easy to get, ‘Oh no, this is just another process,’ and have the team going through the motions,” said Berthold. “But they’ve been asking for these capabilities for quite some time, so there’s a tremendous amount of excitement and I know they’ll get a lot of use out of it.”

About Silverline

Silverline leverages insight acquired through thousands of engagements along with real-world expertise gained across the Financial Services industry, including: banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies. From strategy and implementation to managed services, we guide clients through every phase of their journey — enabling continuous value with the Salesforce platform. To learn more visit: <https://silverlinecrm.com/financial-services/>

The value of a partner with industry and technology expertise

Implementing any new technology can be daunting, especially when dealing with a powerful, multifaceted system like Salesforce. “Knowing how big the system is, that’s where it’s really important to have a partner like Silverline that knows how to build and configure, and has an understanding of banks,” said Berthold.

Silverline’s banking experts know firsthand what it’s like to be in Westfield Bank’s shoes — and how to use technology to solve their problems. That was invaluable in helping the bank make the most of its new platform.

“We were really looking for a partner that could help us through this journey and make sure that we’re getting the best value out of what we’re purchasing,” said Van Ausdale. “The Silverline team was really helpful in saying, ‘This is what we recommend, this is what we’re seeing from other FIs. This is how you could think about it.’ They were thoughtful in not pushing us in a direction, but guiding us in the right direction to really get a solution that was appropriate for our bank.”

[Find out how Silverline can help your bank grow with Salesforce.](#)

