

Driving More Value from Five Star Bank's FSC Platform



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Five Star Bank

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Cleaning up an overly customized implementation

Five Star Bank (the "Bank") uses Salesforce Financial Services Cloud ("FSC") across its enterprise, including Retail, Contact Center, Commercial, Wealth, Residential Lending, and Insurance business units. Another partner had implemented FSC for them, but it had been overly customized, resulting in poor user adoption.

Five Star Bank needed a new partner to clean up this over-customization and advise them on how to build a better foundation that would allow them to expand their FSC footprint. The Bank was aiming to:

- Drive efficiency and scalability across the Bank by removing customized processes and utilizing out-of-the-box FSC functionality.
- Transform customer experience by improving the lead/referral process and providing self-service capabilities.
- Simplify the Bank's employee experience by centralizing data, automating processes, and providing intelligence-driven reporting capabilities.

Taking FSC to the next level

Five Star Bank began working with Silverline to improve its existing FSC platform. Silverline helped the bank by:

- **Moving operations cases to Salesforce**
Silverline installed an operational case process into Salesforce to quickly address customer requests and provide more detailed reporting.
- **Managing the process for customer complaints**
The shift to Salesforce allowed the Bank to address customer complaints faster and achieve comprehensive reporting around the process.
- **Creating cross-sell opportunities**
By installing a quick prompt for Next Best Product/Action on consumer records, the Bank can now promote a cross-sell on clients in a repeatable and transparent way with easier scripting and tracking.
- **Implementing a referral management process**
Silverline moved the Bank's referral process to an out-of-the-box lead management process in Salesforce, conducted a clean-up of current data, and added new alerts to push accountability while cleaning up existing data.
- **Cleaning up data in multiple ways**
Data was cleaned up by updating the feed from the insurance system, cleaning up current data from the core, and updating Junxure feeds, allowing the Bank to have better contact data and fewer duplicates overall.

“Silverline has been substantially more knowledgeable than the previous implementation partner. They have brought immense banking knowledge and have been able to bring great recommendations in this implementation,” said Taylor Veenema, Director of Corporate Strategy at Five Star Bank.

Change management was a significant piece of the Salesforce solution since the previous version had poor user adoption. Silverline helped the Bank develop a change management and communication plan that included an employee training strategy. This approach allowed the Bank to keep impacted stakeholders informed throughout the implementation, empower its training team to lead the Salesforce rollout, and establish clear adoption metrics. The result was successful user adoption, with very few issues reported during go-live.

“Silverline has made an incredible impact on our business,” said KC Barnett, Salesforce Administrator at Five Star Bank. “They have proven to be not just Salesforce experts, but keenly aware of the needs of our industry with sound, consultative advice and creative solutioning. Silverline has been a great partner and we are thrilled with all the work they’ve done.”



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Taylor Veenema
Director of Corporate Strategy
Five Star Bank

Increasing numbers leads to success

Five Star Bank saw these impressive results within the first month of launching Salesforce:

- Weekly referral entry **increased by 74%**.
- Cross-sell using Next Best Action resulted in **\$1.8M in closed/won**.
- **Over 9% of data clean-up** of the current database, including bad and duplicate data.
- Before and after go-live, **an increase from 220 to 305 weekly active users and from 5,640 to 6,422 weekly logins**. Every line of the Bank’s business saw increased users logging in and total logins.
- Based on adding operations cases and complaint cases to Salesforce, **the Bank has already seen 735 hours in productivity savings**.

“Silverline’s team of Solution Architects and other project team members are extremely knowledgeable past-bankers, with vast Salesforce, Banking, Wealth, and Insurance expertise that complemented our implementation needs well,” said Veenema. “I highly recommend the Silverline FSC implementation team, and we look forward to working with them more in the future.”

With Five Star Bank’s strong foundation built, they are looking to expand the use of tools they currently own in FSC while also partnering with Silverline to build new functionality. The Bank is building out more use cases for CRMA and Revenue Intelligence to have more data at the bankers’ fingertips. The Bank is rolling out Salesforce mobile to bankers, and Inbox Outlook integration. Additional Salesforce opportunities are integration with Slack and implementing Salesforce Marketing Cloud.

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/>



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