

Client Story

Top 25 US commercial bank

With nearly 700 locations across the Sunbelt region, our client operates three major business units – Commercial Banking, Retail Banking and Wealth Management – that offer customers unique industry-leading products and services.

Salesforce Solution Enables Top Commercial Bank to Improve Business Response and Target a 15% Increase in Cross Sales

NTT DATA leads path to successful implementation of full-service, cloud-based customer relationship management (CRM) solution.

Challenge

NTT DATA's client, a Top 25 commercial bank, was hamstrung by the outdated and piecemeal nature of its legacy CRM system, which the sales staff for its Commercial, Retail and Wealth Management lines of business used for all functions. Unable to support the anywhere, on-demand reality of the bank's business, the system was unresponsive to user needs, impeded productivity and created a painful user experience. And the long-term support costs of the non-cloud application were prohibitive. To successfully replace the legacy CRM system with a cloud-based solution and rollout a new Salesforce-powered call center, the client needed guidance and hands-on support from outside experts.

Solution

The bank partnered with NTT DATA because of our extensive experience with Salesforce and cloud solutions, global delivery footprint and collaborative approach.

Rapid transition and minimal business disruption were top priorities, so NTT DATA developed the solution in iterative "sprints" consisting of data integration, interfaces, single sign-on, admin setup and technical infrastructure. The project was delivered in two phases.

- **Phase 1** included Salesforce system design, coding, integration and training to deliver a CRM solution via workstations, tablets and smartphones to the bank's 4,000 sales users.
- **Phase 2** encompassed rolling out the Salesforce solution and replacing the bank's outmoded Siebel system.

The first stage of the rollout provided sales functionality to a core group of users across Consumer and Commercial banking. The next phase of deployment will roll out the Salesforce solution to 1,000 customer service and call center agents across North and Central America.

Results

The new Salesforce solution provides all stakeholders with a more user-friendly system that facilitates faster, better decision-making and accelerates the overall pace of business.



The rollout is on its way to achieving the goal of 90% adoption

The new CRM system also enables cross-LOB collaboration within sales — something the bank was not able to do with its legacy system in place.



The sales team is targeting a 15% increase in cross sales in the first post-implementation fiscal year

By moving the bank’s information system to a cloud-based solution, the bank will be able to:



Reduce long-term maintenance



Better ensure the security of its customer data

The new system will be in good hands upon completion of the rollout. NTT DATA’s extensive training and knowledge transfer efforts have equipped the bank’s team to successfully manage the new system moving forward.

Complete Solutions for Your Financial Services Business

NTT DATA’s Financial Services practice combines our business and technology consultants with our experienced technology and BPO specialists. This 5,000-strong team is dedicated to providing financial services clients with comprehensive solutions that enable them to grow and innovate.

We use our industry-specific knowledge, specialized consulting, technology expertise and global reach to help clients successfully tackle their most complex challenges.

Retail Banking	Wholesale Banking	Wealth Mgmt.	Capital Markets
Digital			
Risk, Security and Compliance			
Enterprise Change			
Finance and Treasury Transformation			
Operational Effectiveness			

Let’s Get Started

To learn more about how we can help you succeed, please contact:

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About NTT DATA

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