

Agile transformation program on Financial Services Cloud to launch Member 360 for a Retail Customer

Challenges

- No case management capability
- Improve member experience
- Reduce the time to service a member
- No Member 360 view

Solution

- Implemented Financial Service Cloud with case management, escalation & approval process using lightning
- Real time integration of FSC with Mainframe
- Integration of FSC with Adobe
- Implemented salesforce knowledge to reduce the number of calls needed

Value delivered

- Reduced time on call to service a member
- Service Cloud console provided a single view of the member
- Reduced the email backlog
- Automated the manual payoff process
- Improved member experience

