

INDUSTRY | FINANCIAL SERVICES (BANKS & CREDIT UNIONS)



One of the largest credit unions in Canada, offering a wide range of financial services including personal and business banking, mortgages, loans, investments, and insurance.

### Challenge

A major credit union invested in Salesforce in 2023, hoping the technology would enable its team to better engage new members, satisfy existing customers, and realize the institution's mission of helping Canadians save and spend wisely. But after a less-than-ideal initial implementation, the institution needed help getting its org back on track.

- The credit union implemented Financial Services Cloud and Marketing Cloud in 2023, but did not achieve the functionality or ROI it had hoped for with its first partner
- The institution needed another partner to assess its current state and create a plan to remediate its Financial Services Cloud + Marketing Cloud instances

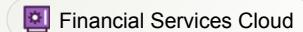
The credit union partnered with us in the hopes of distilling value and ROI from its Salesforce investments.

### Solution

Our team remediated the credit union's Financial Services Cloud + Marketing Cloud instances, allowing the credit union to achieve its intended functionality and ROI. Our consultants:

- Used proprietary accelerators to create a true system of engagement, ensuring members receive exceptional service in the right channel
- Activated cross-sell functionality to boost productivity + member engagement
- Created a consolidated approach for lead and referral management to eliminate missed revenue opportunities
- Connected FSC + Marketing Cloud so the credit union could nurture members throughout their lifecycle and track engagement with reports + dashboards
- Used MuleSoft to integrate existing technical resources with Salesforce

### PRODUCTS USED



### Outcome

Post-implementation, the credit union achieved its intended functionality and now has the 360° member view it needs to:

- Build stronger connections
- Achieve a comprehensive understanding of its members
- Deliver personalized experiences that satisfy and retain members

