



A Global Fortune 50 Bank Unlocks Customer-Centric Growth with Salesforce CRM



How A5 Made Digital Transformation Happen

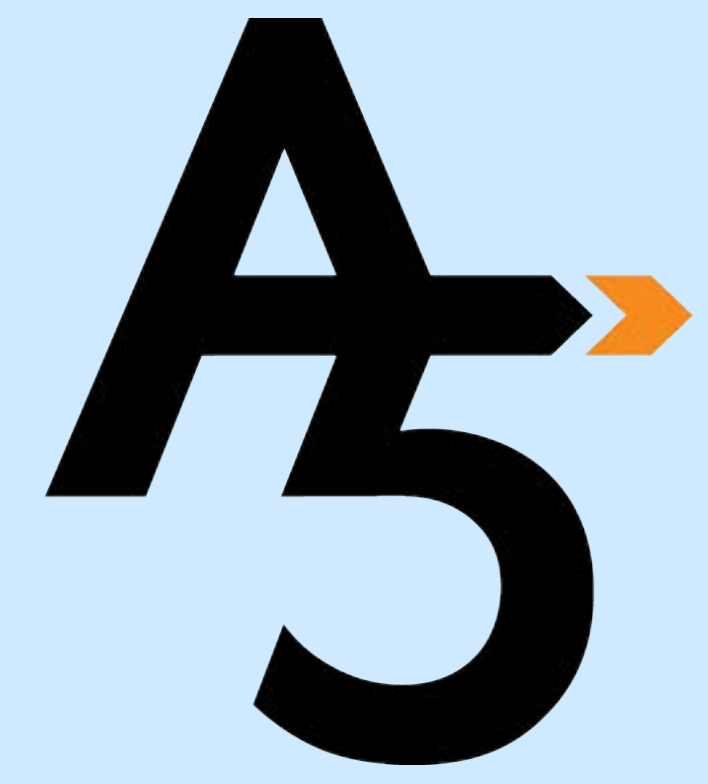
With today's marketplace voraciously shifting towards a digital-first world, more companies like our client, a global Fortune 500 bank, are shifting gears to focus on the engagement and satisfaction of each individual customer. By unlocking customer-centric growth, they have been able to improve customer relationships at a time when customer satisfaction has become more crucial than ever.

Unlocking customer-centric growth is more than just personalizing an email with a person's name. It's about dynamically creating a unique experience for the customer at each moment of their journey. With a focus on sustainability, our team of experts at A5 can show you how Salesforce can be tailored to meet your company's goals, allowing you to meet your customer's needs.

By uniting their teams around the customer, companies have been able to successfully create sincerely connected experiences-all of which benefit the business by:

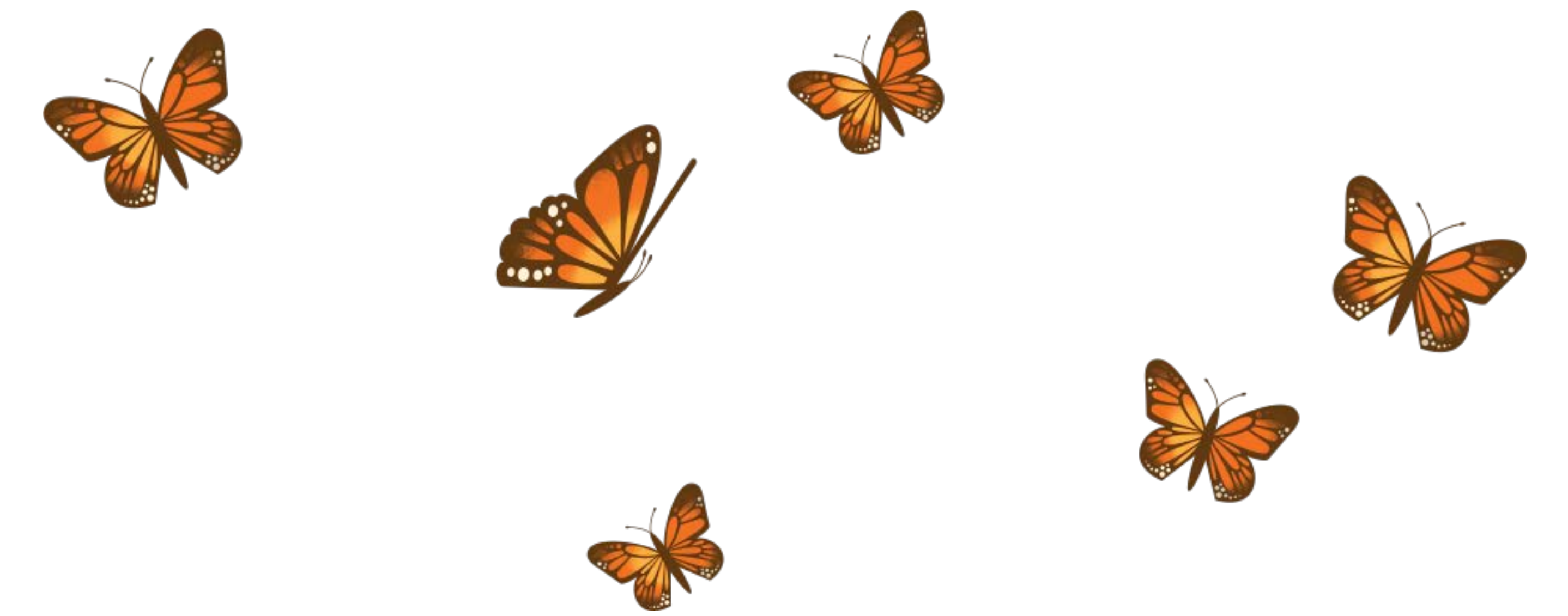
- Deepening customer relationships
- Building brand loyalty
- Accelerating company growth





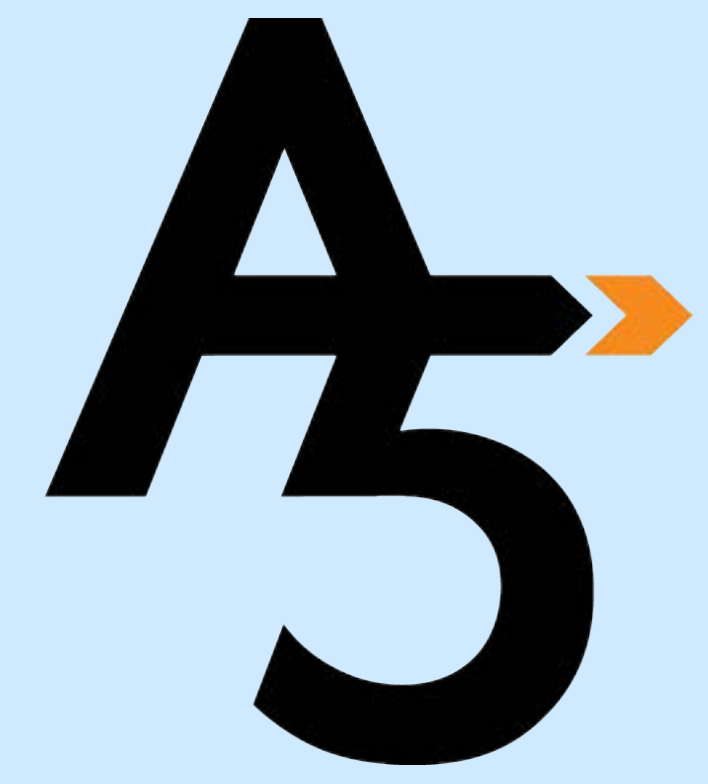
Focusing on the Customer Builds Brand Loyalty

Knowing that their client was widely regarded as groundbreakers in digital transformation, Bryan Musto, Director, Digital Experience and Financial Services at A5, remarked, “As a major bank, the customer always wanted to lead by example, foster a culture of data-driven decision making, eliminate data silos and disconnected systems to deliver digital experiences that are relevant, seamless, personalized, and easy to use for their customers.”



Working with us, they implemented Salesforce solutions and soon saw that these were the right pieces of the puzzle to connect the bank to its high-tech customers and millennials. With SFMC solutions in place, the bank could measure end-to-end marketing effectiveness across all digital channels and devices.

- Bryan Musto, Director of Digital Experience and Financial Services



As all leaders of sustainable businesses will attest, it's equally as imperative to improve the experiences of employees as those of customers. Employees need new technologies to work from home in our ever-changing, digital-first world, so your technology needs to be capable enough to help them collaborate digitally (and efficiently).

When your customers and employees are happy, everyone wins.



The bank has a reputation for being a pioneer in innovation and digital experiences. By introducing Salesforce marketing cloud in their digital marketing services, they could easily reach out to their customers in their preferred channel and medium. Salesforce marketing cloud helped the bank and its staff communicate more widely with their customers at scale using various channels.

- Bryan Musto, Director of Digital Experience and Financial Services



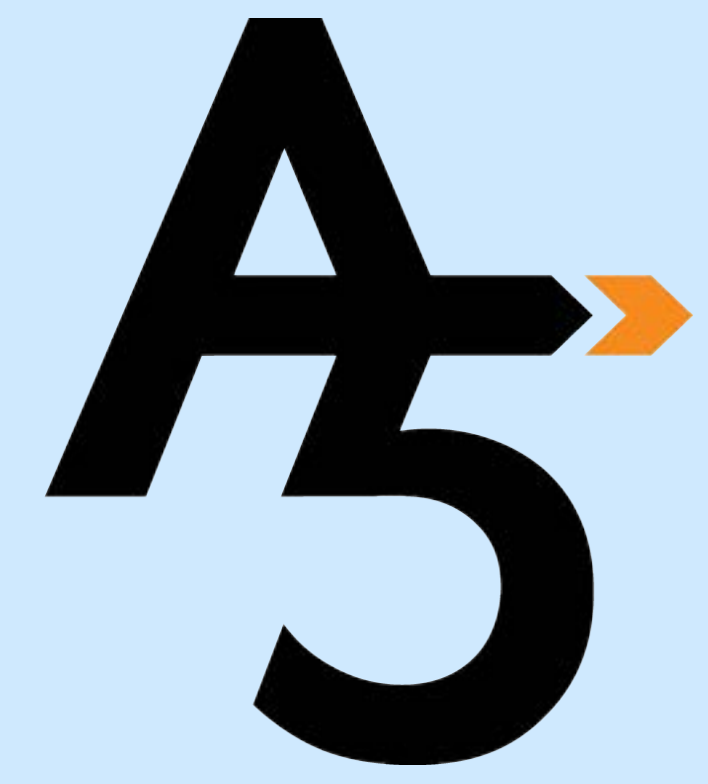
How A5 Helped Pave the Way

Our team at A5 has led numerous companies tread similarly successful paths. Over the past two decades, we've built and led high-performing Martech teams, driven by our passion for helping companies leverage technology to drive business value.

Digital transformation is forcing companies to change the way they have been operating. And this change has been initiated by the customer. Today's customer expects relevant content about what they are doing anytime, especially in the format or device they pick. We knew that the bank is a trendsetter in digital transformation, wanting a seamless system that could unify the pieces of the customer puzzle with the back-end systems of sales, compliances, disbursement, and other teams.

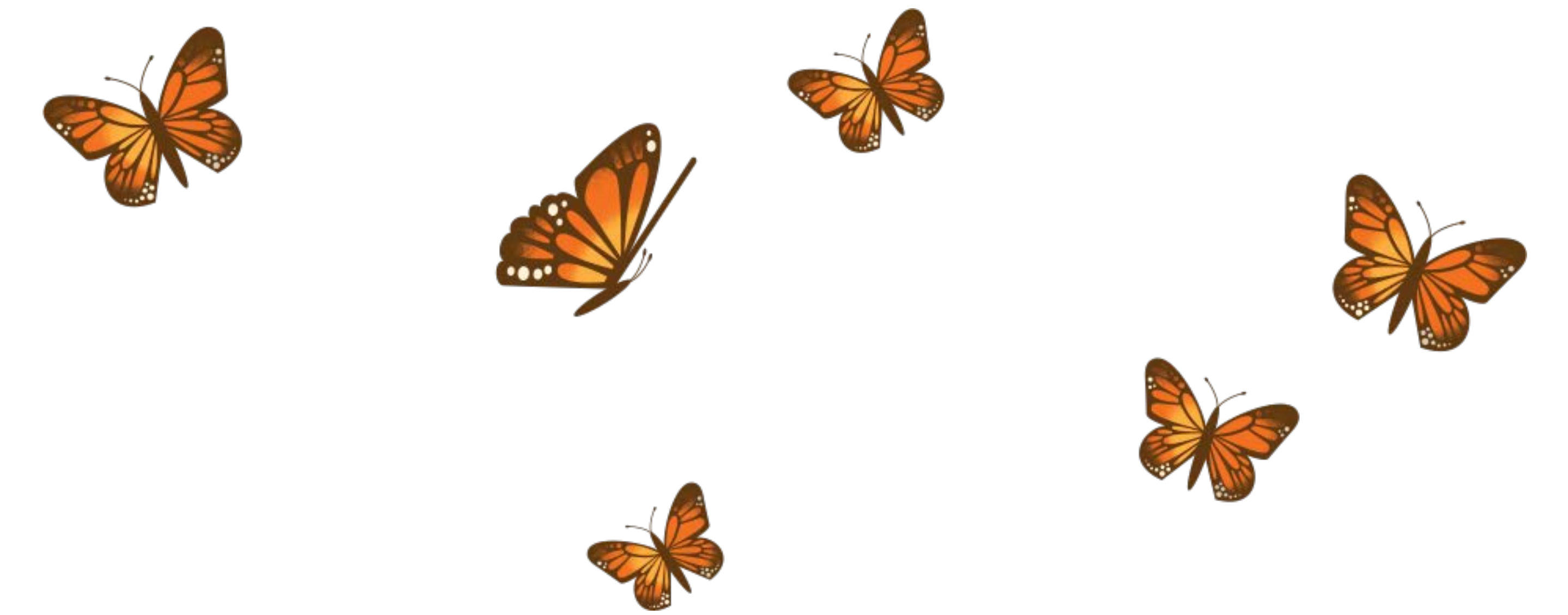
Digital technology has changed consumer habits. Customers now prefer banks to reach out to them while browsing their dream homes, cars, or making a big purchase. Banks, as lenders, need to be close to their customers during every phase of their journey—be it from discovery to the final buying stage. With a shift to digital business, banks can now indulge in providing end-to-end customer experiences across all journey touchpoints.





How Accelerating Transformation Translates into Better Business Performance

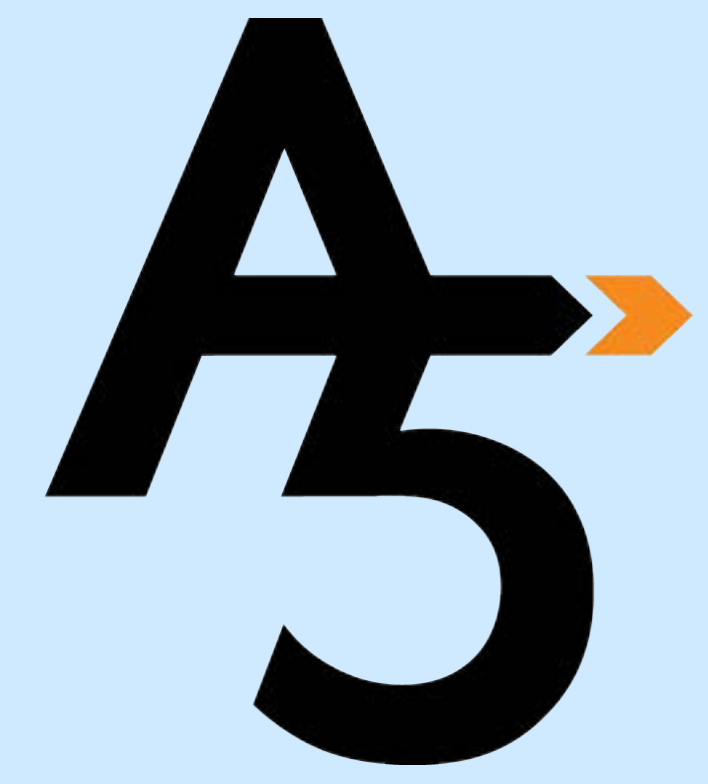
By having the capability of inter-operability, all of your teams can be united on a single, integrated platform. By having access to the same, up-to-date data, companies are able to know exactly what their customers and employees are doing. Looking at the importance of data, Bryan Musto notes, “At A5, we innovate to empower our clients, evolve processes, improve efficiencies, and drive revenue using the latest digital technologies to better serve their customers and employees. [We] helped implement a complete Marketing Cloud for the bank to prosper in every aspect of their business, connecting teams across different silos and creating an engaging experience.”



By unlocking customer-centric growth, A5 was able to assist our client in driving business speed, scale, relevance, and resilience all with the world’s #1 CRM.

Speed empowers business leaders at this bank to make better business decisions quickly. They were able to swiftly adapt to changing business demands by utilizing technology that enables speed and optimizes work by:

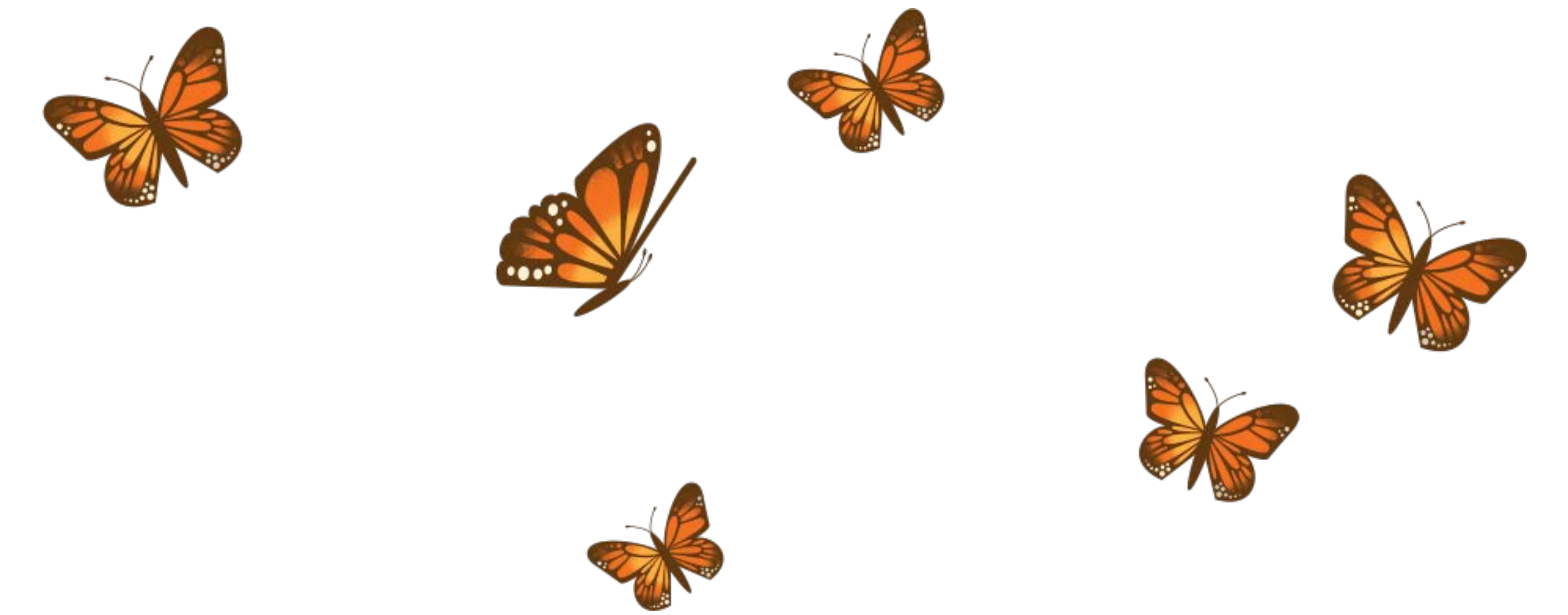
- Unlocking customer data
- Analyzing information faster
- Taking action in real-time, as one company



Scale enables faster innovation and maximum growth by utilizing a CRM platform and tools that easily meet their customers' needs, no matter the scale. Along with increased brand reach, it also:

- Integrates any application, system, or database
- Adapts to the latest market and customer demand
- Intelligently automates customer and employee experiences

Relevance helps this bank's team members reinvent and improve customer engagement by making it more personalized, which engages customers with meaningful and relevant digital experiences.



Resilience empowers the workforce with flexible tools and technology, so they can focus on the most crucial thing—customers. Our client's employees were able to:

- Work from anywhere
- Support instant collaboration
- Upskill with knowledge and training



Bryan described how pleased their client was with the work they did together. The client immediately noticed a dramatic increase in positive feedback from their customers. "Implementing the SFMC solution in their system has increased acquisition, improved cross-sell, decreased early attrition, and the enhanced B2C marketing programs lead to more demand deposit accounts and revenue. Overall +30% increase in marketing ROI, +32% lead volume, +35% lead conversion. The customer experience became seamless, personalized, strategic, data-driven engagement across all channels (voice, chat, social media)," explains Bryan.

What This Means for You

If you're interested in unlocking customer-centric growth with Salesforce, A5 can provide similar services to help lead the way. Find out how making the transformation allows your company to grow revenue, elevate innovation, and increase influence across your industry.

That's the way the Cookie Crumbles

One last important thing to note: In 2022, Google Chrome will join Safari and Firefox in phasing out the third-party cookie—a change that's set to shake up the way many companies personalize their ads and digital marketing campaigns. Using the power of the Salesforce CRM, A5 has been able to stay ahead of the game by preparing for a post-cookies world ahead of time by utilizing smarter segmentation and bringing the human touch back into digital marketing.





About Salesforce

Salesforce is the global leader in Customer Relationship Management (CRM), bringing companies closer to their customers in the digital age. Founded in 1999, Salesforce enables companies of every size and industry to take advantage of powerful technologies—cloud, mobile, social and artificial intelligence—to create a 360° view of their customers. For more information about Salesforce (NYSE: CRM), visit: salesforce.com

About A5

A5 is a Global Salesforce Summit Partner and a Salesforce Ventures Portfolio company specialized in multi-cloud transformations with deep experience across High Tech, Manufacturing, Financial Services, Communications Media Technology, and Professional Services industries. With many IPs, accelerators, and Industry Solutions, A5 helps customers in their Transformation Journey and delivers with a 5/5 CSAT. With numerous Master Navigator and industry specializations, A5 is a preferred Salesforce Transformations, Platform Development, and Integrations partner for businesses across North America.

For more information about A5, visit: a5corp.com

