

# Building a harmonious bridge between CRM and CLM.



Client Lifecycle Management

First Derivative partnered with one of our global clients to scope, develop, configure and test the compatibility of Salesforce to deliver a one size fits all client outreach tool.

Once operational, First Derivative fused the tool with the in situ Salesforce Org solution, to deliver a single client regulatory view across multiple jurisdictions and business lines.

## RESULTS

### 20,000

Active EMEA counterparties consolidated & added to Salesforce Cloud

### 16 week

Project from concept to delivery

### TOM

Delivery of Target Operating Model for execution of outreach

### Pardot

Delivery of Salesforce Pardot as an enhancement to current Salesforce Org

### 70% ↓

Less duplication of activities & time taken to email large volumes of clients

### 100% ↑

Traceability & accuracy in single client view, tracking all client activity

# We flexed the world's leading CRM solution to **enhance end-to-end Client Lifecycle Management.**

## PROBLEM

A global bank was facing operational and regulatory challenges in providing its clients with a smooth and frictionless customer experience. Inherent complexities existed around multi-faceted entity structures, meaning numerous variables and obstacles needed to be considered to achieve its goal of providing a unified, holistic approach to client compliance – across the group.

Legacy, labour intensive processes, including email traffic to large cohorts of clients to satisfy the regulatory agenda proved inefficient and resource heavy – with tracking and reporting a challenge.

## WHAT WE DID

First Derivative was engaged, as a partner, to build the foundations for a new Client Management Services function. The task was to work with the business to service clients on all aspects of non-revenue generating topics, including regulatory outreaches, onboarding and KYC. A key priority of the function was to deliver a client outreach tool and consolidated data repository on existing Salesforce infrastructure.

Advisory work on potential market solutions, as well as building enhancements to Salesforce Cloud and the implementation of Salesforce Pardot was undertaken by the First Derivative project team.

## DELIVERABLES

- / Acted as Outreach SME on delivery of Salesforce Pardot and Case Management in Salesforce Cloud
- / Operationalised and defined global client outreach requirements to ensure Minimum Viable Product was delivered in phase 1 of the tool's testing and development
- / Owned, interrogated and robustly challenged work packages on each of the sprints delivered over all the associated delivery phases
- / Co-ordinated, challenged and approved the technical tool delivery plan across bank functions
- / Designed the now embedded Client Management Services target operating model, workflow and outreach - with new enhanced automation of the tool's responses and query management