

CASE STUDY: FINANCIAL SERVICES

One of the First Deployments of Oracle Sales Cloud FINS Banking Solutions

Business Overview

providing comprehensive solutions and expertise to businesses and individuals (~13B in Assets)

Business Challenge

- Manage acquisition growth – 10 acquisitions in 10 years
- Renewed focus on client retention and organic growth driven by customer acquisition and targeted cross sell/upsell activities
- Difficulty executing a consistent sales process across different (Lines of Business) LOB's and tracking those activities
- Challenged knowing the complete customer relationship at a glance across all LOB's

Oracle Solution

With a a portfolio of banking CRM implementations and integration experience specific to banks, eVerge worked closely with Oracle, beginning with the RFP, to guide and navigate the sales cycle in a way that benefited both Northwestern Bank and the Oracle/eVerge team. eVerge Group demonstrated deep industry expertise and was able to help communicate the vision of a modernized customer experience using **Sales Cloud FINS Banking** solution.

- Phased deployment across 1500 users, 150+ branches, multiple Lines of Business
- Consolidated various CRM's into a single enterprise solution
- Leveraged Customer Data Master within Sales Cloud
- Deployed Marketing Cloud (Eloqua)
- Incorporated Bank Acquisition into deployment efforts

ORACLE
SALES CLOUD

Results

- Standardization of business processes
- Increase cross-sell and upsell opportunities
- Gain insight and access across the enterprise
- Speaker/presenter at Oracle's Modern CX event
- Initial Phase of deploying Engagement Cloud

