



Transforming
Customer Experience
with Salesforce



# 1. Partner with us to unleash full potential from Salesforce & enhance your Customer Experience

## **Benefits realized by Our Clients**

# **Smart Outreach with Intelligent Sales**

Increasing top line through data driven precision marketing and intelligent sales

## Optimized Digital Onboarding

Transforming customer onboarding through personalized and enhanced digital experiences

#### **Connected Servicing**

Empowering call centers with seamless connectivity and intelligent insights to improve productivity and customer satisfaction

#### **Unified Banking**

Harnessing the power of Salesforce through connected core and loan origination applications for accelerated growth

# 2. Many Financial Institutions are unable to realize full potential from Salesforce

## **Challenges**

- Lack of inhouse expertise, talent & significant funds to implement Salesforce
- Beyond Implementation they require support in Training, Ongoing Support & Change Management



- Broken Leads & Referrals
- Abandoned Applications
- Fragmented Onboarding experience
- Disconnected Servicing due to Siloed systems
- Unavailability of actionable insights leading to Revenue leakage
- Inconsistent business processes across LoBs

## 3. Infinite's Salesforce Practice delivers frictionless Salesforce journey for Banks & Credit Unions

- Reusable components leveraging the power of Financial Services Cloud and Mulesoft
- Prebuilt connectors enabling real-time integrations with key applications including core banking and Loan origination systems
- Highly agile solution packages for different stages of transformation journey



Deepened Member Knowledge and Holistic Visibility

▲ Lead Conversion Rate

Acquire New Members and Retain Existing Members

▲ Cross / Up Sell

▲ Collaboration

Strengthened Relationships and Member Service Excellence

▲ Customer Satisfaction

Streamlined Lead & Referral Management

Agent Productivity

Automated Workflows and Realtime Actionable Insights

▼ Case Resolution Time

Innovative Solutions Improving Employee Experience

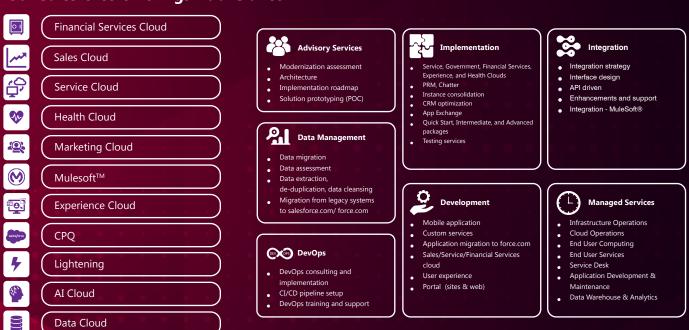
App Configuration Time



# 4. Our Packages with Prebuilt Connectors and components to accelerate your Transformation



# 5. Our Salesforce Offerings At-a-Glance



## 6. Case in Point

Infinite delivered Salesforce powered digital transformation for a large credit union by harnessing Financial Services Cloud. Infinite implemented Member 360, Einstein and Mulesoft based integration with banking applications.

This led to streamlined business processes, enabled single view of customer with Member 360° resulting in ~20% reduction in call

Infinite partnered with a large Credit Union to integrate Salesforce to its core ensuring minimal disruption to business. Infinite developed a real-time data exchange, enabling service reps to obtain account information in real-time, achieving true 360-degree client view.

handling time, Optimized member verification time by ~30% and enhanced customer experiences.

Infinite delivered Salesforce driven integrated Vendor management solution for a Regional Bank helping them in migration from Salesforce Classic to Lightning, development of Partner community on Salesforce Experience Cloud, Workflow driven integration to Third-Party vendor platforms, development of automated decisioning processes & Integration of Salesforce with other Applications. The solution created seamless vendor experience, reduced vendor verification time from 30 minutes to 5 minutes, and deal decisioning turnaround time from 1 hour to only 10 minutes.



## **About Infinite**

Infinite is a global leader in digital engineering and IT services, with over two decades of experience helping clients in digital transformation and creating business value.



\$1B+

Revenue

16000+ Global Employees

Delivery Centers

Delivery Centers across Onsite, Nearshore and Offshore 150M+ Lives touched 400+

Infinite helps Financial Institutions meet rapidly changing customer expectations, exploit disruptive business models and new technologies, become more efficient and resilient, and navigate uncertainty, risks and regulations. We deliver this with our "NextGen" Domain, Digital, and Platform Engineering services.

#### The Infinite Difference

Strong domain expertise across banking, payments, lending, asset management and insurance built from years of experience in designing and building business platforms for Fintechs and other clients. This enables us to deliver tangible business and transformation outcomes thereby delivering *greater value*.

Our deep product, engineering and platform capabilities including architecture, design, build, integration, automation, DevOps and CloudOps. This enables us to deliver next gen business platforms and data driven customer experiences thereby delivering **speed to value**.

Meeting clients' needs with cost effective offshore, nearshore, and onshore teams, deep engineering talent, and flexible and Innovative engagement models from augmenting teams, end-to-end managed services, and outcome-based engagements. This enables us to *deliver value efficiently and predictably*.