



Traction Banking

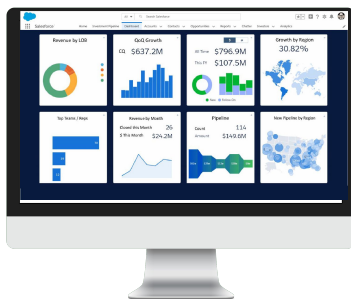
Accelerate Time to Value for Your Teams

Traction Banking offers an accelerated approach to implementation of the Financial Services Cloud Platform. This accelerator is comprised of proven best practices across 85+ implementations in Banks and Credit Unions across North America. Traction Banking provides a preconfiguration of the 360 degree view of the customer relationship, lead and referral management, financial accounts and roles, effective pipeline management and action plans.



PIPELINE MANAGEMENT

- 360-degree view of the customer
- Opportunity sales process configuration
- Financial accounts and roles
- Intelligent lead and referral management
- Custom campaign builder



DASHBOARDS & REPORTS

- Action plan templates for repeatable processes
- Branch management
- Relationship whitespace visualization
- Success metrics reporting package

“Banks and Credit Unions often lack the resource capabilities to execute effectively on their technology investments.

Traction Banking accelerates your implementation of the Financial Services Cloud Platform while providing measurable success.”

Pamela Hannett
Principal Strategist, Banking
Traction on Demand





Traction Banking

Implementation Details

TRACTION BANKING BESPOKE

INSTALLATION

- Financial Services Cloud org setup
- Traction Banking set up

ELABORATION

- Identify configuration for any desired custom objects and fields, additional sales processes, labels and company branding
- Security and permissions settings

CONFIGURATION, INTEGRATION & DEPLOYMENT

- Customization of field data and user interface
- Security configuration of users, roles and permissions
- Deployment of custom configurations to production environment
- Integration to Core Banking System

TRAINING & GO-LIVE

- Train the trainer and/or end user training
- Knowledge transfer to internal team.

OPTION ONE

TRACTION BANKING CORE

8 Weeks

ESTIMATED COST *

Starting at \$56,000

* Costs include install and configuration of the accelerator in a new Salesforce Financial Services Cloud instance. Templated elaboration, change management and training plans as well as one templated daily batch integration to core banking. Additional data migration, integrations and customizations are available via a services engagement. ETL solution may be required.

OPTION TWO

TRACTION BANKING BESPOKE

SET UP FEE*

\$30,000

* Costs include install and configuration of the accelerator in a new Salesforce Financial Services Cloud instance. Additional configuration, features, functionality, data migration, integrations and customizations are available via this services engagement. ETL solution may be required.

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