

Note:

The following slides are selected **excerpts from a larger presentation deck.**

Content has been modified and anonymized to preserve confidentiality.

*Megan
Palmisano.*

DollarBank®

salesforce

Drive Growth and Customer Experience with the #1 CRM

Salesforce Professional Services



The Team Supporting Your Salesforce Success

ACCOUNT EXECUTIVES

Licenses, billing, provisioning,
contracts, new products,
Dreamforce, Connections, etc



Team Member
Business Title



Team Member
Business Title

TECHNICAL SERVICES



Team Member
Business Title



Team Member
Business Title



Team Member
Business Title



Team Member
Business Title

LEADERSHIP

Oversight, executive
alignment and
engagement



Team Member
Business Title



Team Member
Business Title



Team Member
Business Title



Team Member
Business Title

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Team Member
Business Title

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Team Member
Business Title

SECTION

01

DollarBank®

salesforce

Salesforce Overview & Demonstration

Salesforce has a long and successful history in **Financial Services**

DollarBank®



XX years

Financial Services Firms using Salesforce

8 years ago launched industry product

Financial Services Cloud (FSC) serves all sectors of the Financial Services industry

Banking

Insurance

Lending

Wealth Management

Asset Management

Industry Innovation

3x releases annually
24 Financial Services-specific releases

Built with Trust



ISO 27001, ISO 27017,
ISO 27018



Privacy Shield - Framework for complying with EU GDPR requirements



SOC 1,2,3 Public report of Security, Availability, Integrity, Confidentiality & Privacy



EU Cloud Code of Conduct
and many more...

Customer Success

Supports 1200+ Financial Services customers

TRUIST

PENFED CREDIT UNION

Huntington



EVERCORE



OneUnited BANK

Partner Ecosystem

9k+ AppExchange Partners
400+ Financial Services Apps Listed

ncino

Q2

Terafina

GUIDEWIRE

AgentSync

SKIENCE

GENESYS

Broadridge

SS&C

ENVESTNET

Connected Vision

Let's get you there.

Seamless Experience for All

Create more seamless ways for members to interact across channels that they prefer but have a consistent experience.

Digitize & Automate Led Approach

Reduce manual steps and offer digital channels to promote efficiencies, better experiences, and cost savings.

Unlocked Data for Personalization & Insights

Leverage data to drive greater insights, better forecasting, next likely actions and personalized experiences through a complete member 360 profile.

Scalable Platform for Growth

Enable administrators to modify, configure, and deploy reusable technology assets over time to scale, adapt, and grow with the business.

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Thank You.

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