ideaport RIGA

From Legacy to Innovation:
How Ideaport Riga Helped a Bank to Execute a Smooth CRM Transition to Salesforce

Global Banking Institution

Client Overview

A globally known bank which focuses on delivering great results and making a difference for its clients and communities. Recognized for innovation and excellent customer service. Globally familiar as a large bank.

The bank offers an extensive array of financial solutions to meet diverse needs and goals. They offer basic banking services like savings accounts and loans, as well as new investment options and personalized help managing money, aiming to meet all their customers' financial needs.

Their dedication to providing comprehensive and accessible financial solutions sets them apart as a trusted partner in helping individuals and businesses achieve their financial objectives.

Products Involved

- **Salesforce Financial Services Cloud**
- **Salesforce Shield**
- **Apache Kafka**
- **Apache Camel**

Challenge

At the beginning of our collaboration with the bank, we were helping with the old on-prem CRM platform adoption for their operations and needs. This platform, while functional, appeared noticeably older in design and functionality compared to more contemporary systems. Recognizing the importance of staying current and secure in today's fast-paced digital landscape, the bank actively was looking for a more modern solution.

They aimed to transition to a cutting-edge CRM system that not only boasted advanced features and functionalities but also addressed a high-security standard to keep their customers safe and protected.

The client expected their partner to implement a new operating model, transforming CRM processes and replacing the existing CRM with Salesforce. The bank's data should be moved to the cloud without compromising the highest security standards and without breaking existing integrations and reporting.

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> "It's been a real signature project for us! But for us as the application delivery team it's been an incredible journey from concept, thru inception to implementation. It's presented us with new challenges from start to finish, which you've all embraced, really got stuck into and delivered with an incredibly high level of quality and professionalism!" (Head of IT)

Solution

The collaboration centred on configuring and customizing Sales and services of the Financial services cloud and Salesforce Shield to meet the bank's industry-specific requirements.

Advanced data migration and reconciliation scripts were built using the Salesforce Data loader to support smooth data movement from the old CRM system to the new Salesforce CRM. The scripts incorporate complex data validation and error handling to match higher data quality standards within Salesforce.

With every solution we had to balance between using ready-made tools from Salesforce and making our own, mainly because we needed to keep things extra secure. For example, we considered using Salesforce CDC but ended up with a bespoke solution based on the Platform events to fulfil additional security requirements for data streaming.

This solution allowed us to synchronize data in a near real-time manner to the Bank's on-prem systems and cloud-based systems without compromising on security. Throughout the collaboration, Ideaport Riga deeply focused on activities such as:

- **Technical Architecture**
- **Cybersecurity**
- **Integration**
- **Data Migration & Data Streaming**

Implementation and Collaboration

Initially, our approach involved working in Agile Sprints, focusing on one specific goal at a time. Our essential processes included Technical Design implementation and Technical Architecture, requiring meticulous planning and execution to seamlessly integrate each component into the system.

Another crucial part of our collaboration emphasized data integration and streaming, especially with Kafka. Leveraging Kafka's capabilities enabled efficient and reliable data transfer, facilitating the handling of large data volumes effortlessly.

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> "The new service went live, and the business had a very smooth experience with their new CRM approach!" (Head of IT)

We developed a set of complex data migration scripts using Salesforce Dataloader to facilitate a smooth transition between systems. Through thorough testing and optimization, efficiency and reliability, resulted in a successful transition with minimal disruption to our operations.

Ideaport Riga conducted numerous Demo Sessions as part of our collaborative process, during which we showcased our solutions to the client. These sessions allowed the client to provide feedback, ask questions, and share insights into their needs and preferences.

Working with the bank directly presented challenges, as they prioritized strict security and surpassed Salesforce Shield standards. We tailored custom solutions to meet their heightened security needs, ensuring data protection during transit.

Business Impact

Through our successful collaboration with our client, they have achieved a comprehensive digital transformation, effectively meeting their company's current needs.

For many years, we have proudly partnered with a leading global banking company, dedicated to providing exceptional service and innovative solutions to their clients.

Our ongoing commitment to this partnership extends far beyond the present, as we eagerly anticipate many more years of collaboration.

During this time, we're committed to elaborating our client's CRM platform, ensuring it remains at the forefront of technology and fully equipped to support their business objectives.

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"This programme has required us to fundamentally change how we deliver. Tackling a completely new agile delivery approach working across the business and business change teams the aa nature of the application service, a whole new integration architecture, new security challenges, data orchestration, using new strategic application suppliers and new coordination across our existing ones, integration with our existing application estate."(Head of IT)

Moreover, our focus extends beyond just updating the CRM platform; we are dedicated to ensuring its security and resilience against any unforeseen challenges.