

Making financial services future-ready through application modernization

Transforming a global federal credit union with Salesforce



The US-based client is one of the largest federal credit unions and a pioneer in financial services like loans and mortgages. They have a portfolio of award-winning credit cards and offer innovative solutions to their members worldwide. The client bagged over a million members and assets worth billions under its capability with its unique mission and vision. It partnered with HCLTech to move from legacy applications to a modern, efficient system complementing its services using Salesforce.



The Objective:

The client was seeking solutions to address the 'Achilles Heel' of digital transformation or the presence of legacy applications that were slowing down the transformation journey for the company and were unable to adapt to the rising business needs which includes better customer experience, and better ROI.

The Challenge:

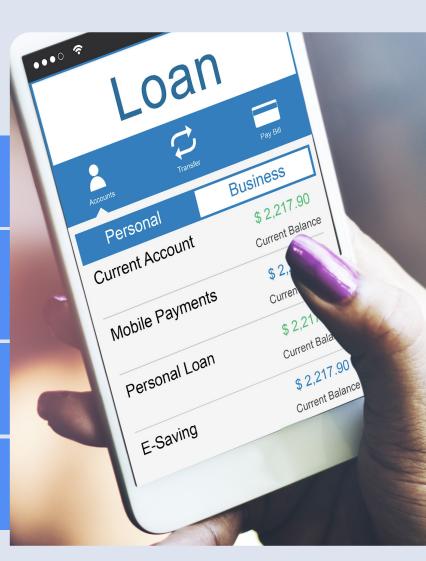
Our client wanted to overcome the following challenges:

Develop dynamic business functionality with the Out-of-the-Box (OOB) platform offering to achieve faster ROI

Bring an omnichannel solution hosted on Cloud to support complex integration with downstream applications

Enhance mobile-first user experience with intuitive, clean standard interfaces

Develop the ability to monetize the final solution to other credit unions



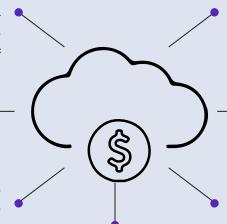
The Solution:

The transformation journey mainly focused on the migration from the old legacy systems to new, modern applications that supported the objectives, further improving the strategic mindset of the company. Here are the key highlights of the transformation journey:

Financial Services Cloud

Evaluated Salesforce as the cloud platform for customer engagement channel by delivering several Proof of Technology (POT) on Salesforce products

Transformation of the sales process from the legacy bespoke application to the Salesforce platform for all product lines, e.g., personal banking, loans, mortgages, insurances, etc.



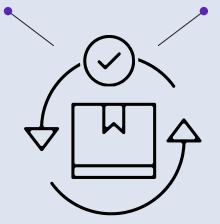
Migrated the customer services and employee functions from the legacy application into Salesforce Financial Service Cloud

Implemented custom user experience and UX consulting by using the lightning component library and design systems

Online Channel
Enablement for member
services using Salesforce
Experience cloud

Continuous Integration / Continuous Delivery (CI/CD)

Established an agile DevOps operation for the company by implementing continuous integration/continuous delivery (CI/CD) pipeline and automation testing process. This resulted in real-time deployment changes to the software with improved team collaboration and better software quality



Extended the implemented solution to other credit unions by packing the solution into Salesforce AppExchange

The Impact:

With the support of HCLTech, the customer could move away from legacy systems towards application modernization, further strengthening the company's strategic and growth agenda.

