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Performance Insights and Apex IT Partner to Address the CRM Challenges in Banking

Just 40% of the top 500 banks in the United States have achieved CRM adoption rates and sales performance that meet their expectations, the Salesforce Banking Hub solution for financial institutions includes the best practices of the highest performing banks.

Performance Insights and Apex IT partner to launch a series of Salesforce innovations for banking that incorporate Performance Insights' latest research of the top 500 banks in the United States. Together, the partners have more than 40 years of CRM experience in banking with over 125 prestigious banks including Umpqua Bank, BMO Harris, BBVA, Wells Fargo, Citizens, South State Bank, First Tennessee, and Bank of Scotland. Together, the partners form the largest and most experienced CRM consulting team in the United States exclusively focused on banking. Performance Insights has a long history of exceptional CRM implementations featuring best practices for employee engagement (the Kaizen process for Continuous CRM Improvement). *"Performance Insights and Apex IT have created a harmonious partnership intersecting profound financial service industry insights and leading-edge technical prowess. Together we offer solutions, driving customer transformation and program enrichment,"* says **Carol Paige** carol.paige@apexit.com, SVP Apex IT. *"Performance Insights has developed the Salesforce Banking Hub, which will be a significant advancement in the banking industry, and we are excited to partner with them and help them scale this to market."*

The Salesforce Banking Hub: A Solution for Rapid Implementation and Improved Data Quality

The Salesforce Banking Hub is built on the Lightning platform. *"As a platform, Salesforce Lightning replaces Salesforce Classic. It is simply a better option for banks, with an exceptionally easy interface, more advanced data validation, security features, pre-built process automation, and integration with all popular core processors, loan origination systems, and over fifty other bank systems,"* says **Ron Buck** ron.buck@performanceinsightsteam.com, Performance Insights founder and CEO. *"More importantly, the Salesforce Banking Hub is based on a proprietary data model to ensure a higher level of data quality for pipeline management, portfolio management, incentive compensation, reporting and analytics."*

These Salesforce innovations are designed for industry-leading data quality. The Salesforce Banking Hub is a set of configurable Lightning applications (a set of 'Lego-like' building blocks) and a hub that seamlessly integrates with core processors, loan originations systems, other CRM systems, data warehouses and fifty other banking systems. Banks may purchase a single module to improve their existing Salesforce installation or the entire solution.

The Salesforce Lightning Experience for Banking leverages Performance Insights' research with the top 500 banks in the United States. *"To build this new solution, we had to adopt new thinking about*

CRM deployment – new thinking we learned from the highest performing banks in the United States. Most bank CRM implementations have little chance for success because they start from scratch without the collective knowledge and best practices of the best performing banks. With our new research (What Winners Do Differently) struggling banks now have a deployment guide and configurable technology building blocks for success,” says **Buck**. The configurable building blocks include Lightning Applications for multi-product pipeline management, prospecting, loan origination, non-loan origination, cash management, financial advisors, operations, reports (including incentive compensation), and an interactive customer portal for an exceptional lender and borrower experience.

About Performance Insights

Performance Insights is a financial services advisory and technology firm transforming the sales performance and lending of banks, the fintech market, wealth managers, and RIAs. Performance Insights has served over one hundred prestigious financial institutions over two decades.

About Apex IT

Apex IT has grown since 1997, but its mission remains the same: to guide financial institutions, corporate, public sector, and higher education clients on their journey to be more efficient, productive, and profitable. Apex IT has completed thousands of engagements around the globe, including the United States, India, Asia Pacific, and Europe, helping clients with everything from strategic guidance to implementation to long-term direction. **Contact Austin Maxey to learn more about APEXIT: austin.maxey@apexit.com.**



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