SILVERLINE

Harnessing the Power of FSC and nCino:
How CAP COM Stays Community-Focused

CAP COM, an Albany-based Federal Credit Union, knows that a credit union isn't really about the money — it's about what you do with it. Their affordable financial services are locally owned by members, focusing on a community-led approach. As their motto states, they're there to "help you fulfill your dreams."

CAP COM
Federal Credit Union

They needed technology that would drive growth, operational efficiencies, and service improvements. But most importantly, they needed technology that their team could own and become experts in implementing day-to-day so that it could grow and change with them.

That's why they turned to Silverline's trusted experts in the financial space to implement Financial Services Cloud alongside an nCino implementation.

Managing multiple legacy systems

Like most organizations, as the credit union grew, so too did their technology stack. Their teams were stuck juggling different systems for marketing, referrals, and account management, with no central view of what their members needed. "At CAP COM, our focus is really on our local community," said CTO Jason Greco. "We always want our members to get the best possible experience. But with siloed, disparate systems, that was extremely difficult and involved a lot of manual processes."

That meant that when someone came into the credit union or called one of their support lines, they weren't able to see all of their accounts — especially if they had multiple interactions, like savings, checking, mortgages, and wealth management.

"Our teams each had their own system, making it more difficult to work together," said Greco. "We knew we needed to consolidate our efforts and make our operations more efficient in order to remain competitive and continue to grow."

The team needed the visibility of a single pane of glass to understand how their members engaged with the credit union, track sales pipeline, and note general interest for future marketing efforts.

They partnered with Silverline, choosing Salesforce Financial Services Cloud, paired with nCino, to unify their member interactions and provide a clear picture of every member. Said Greco, "Our goals came down to three things: driving sustainable, profitable growth; streamlining and automating workflows and making our team more efficient; and giving our members the best possible experience."

With over a decade of experience in the Salesforce ecosystem, Silverline leverages best practices acquired through more than a thousand implementations, with a core financial services team that possesses industry knowledge across all lines of business. Implementing Financial Services Cloud gave the CAP COM team room to focus on what matters: the member experience and their local community.

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Creating a 360° view of the member

Building a better member experience starts with making data more accessible to everyone in the organization. Silverline helped digitally transform their business, establishing key indicators for member interactions — so the team knows when someone is interested in doing business beyond a checking or savings account, like a mortgage or car loan — they can leverage to capitalize on an opportunity.

"Reporting and tracking is so much easier," said Greco. "I can really see everything that's going on at a high level, and my team can have much deeper conversations with members to get them the services they need."

Financial Services Cloud paired up with their existing nCino implementation so they can more easily track and visualize member relationships, source and prioritize referrals, streamline handoffs and coordination among key stakeholders, and provide visibility throughout the entire lifecycle. A 360-degree view makes it easy to work together as an organization.

"It's transformational, what Financial Services Cloud has done for our business," said Greco. "We're able to have so much more personal conversations with our members, and really serve the community."

An accelerated roll-out to get up and running quickly

And they did it all by moving at the speed of Salesforce, rolling out the new system to their entire organization much more quickly than they originally anticipated. "I was so impressed by how quickly we were able to get everything up and running," said Greco. "We started out with a small subset of the team, but it was so successful that we fast-tracked it credit union wide."

"We really worked as one team with the CAP COM project team to make this implementation successful. While we helped with implementation, we were also there to guide and enable them while they did some of the heavy lifting, especially with complex data integration work. I was impressed by the effort and the way the team just jumped right in and really took ownership," said Rob Burkett, Principal Consultant associated with the project.

CAP COM chose to go all-in on their digital transformation initiative with Silverline, which meant multiple projects were happening at once. But they got it all done on time with coordinated teamwork. "It was important to me that my team would own this as much as possible," said Greco. "And I can't say enough great things about the Silverline team. They helped guide us every step of the way and really helped our team feel empowered and ready to take this on.

Realized Results

Our collaborative solution met over 100 requirements within the first six weeks of work. For technical and patient-based goals, KPIs were built around engagement between staff and patients to ensure they appropriately met patient needs, taking into consideration location, procedures, and providers to remain cost-effective for providers and patients alike.

Silverline implemented Health Cloud and the client can now meet patient needs and connect them with a care coordinator faster with proactive staff planning and a connected view of their journey. The Silverline team created built-in alerts to flag care coordinators when a new patient is in need. They can now connect with the patient at the right times in their care journey to provide the resources and encouragement needed to manage their disease. At the same time patients' needs are being met, coordinators are creating worklists and tasks to stay in the loop as the patient moves along in their care journey.

With automated workflows and enrollment, enforced and tracked KPIs, care coordination, ingested activity reports, and improved statement billing — their increased efficiency has reduced their cost and allows them to connect more patients to fair and focused care.

About Silverline

Silverline has real-world expertise in the Financial Services industry, including banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies. We combine strategic planning, implementation, and ongoing support to help clients realize continuous value with the Salesforce platform. To find out more, contact us at financialservices@silverlinecrm.com.

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