

## BOK Financial Banks on Salesforce.com: Training and Consulting Deliver Results



“Salesforce.com offered best-in-class functionality, along with rich planning, implementation, and training services to help us get started.”

— Charles Sparks  
Senior Vice President, Commercial Operations

### Industry

Financial Services

### Geographies

United States

### Challenges

- :: Unify multiple front-office information systems following numerous acquisitions
- :: Integrate BOKF's current CRM processes with the bank's core banking systems
- :: Find a CRM solution for relationship managers that provided a complete view of their customers
- :: Increase visibility into customer relationships
- :: Increase CRM adoption: only 50 percent of the commercial banking group used the legacy CRM system

### Solution

With the help of **Successforce Consulting**, BOKF implemented **Salesforce SFA** in 150 days. Training from **Successforce Education**, including **Administrator and Executive Workshops**, helped drive more than 90 percent user adoption.

### Results

- :: BOKF's Salesforce solution integrates with the bank's core banking systems, providing the sales team with a complete view into customer accounts and histories
- :: Custom dashboards for managers and executives provide insight into customer opportunities and other key business indicators
- :: Integration across systems and ad hoc reporting capabilities mean BOKF spends less time gathering information and more time meeting customer needs, increasing productivity and customer satisfaction

Few industries are as competitive as financial services, which is why so many banks turn to customer relationship management (CRM) software to refine their customer-facing business processes. Not all of them succeed. As BOK Financial Corporation (BOKF) has learned, success is driven by clear implementation goals and a successful training regimen that gets everybody in the organization on board.

Teri Dreyer, director of CRM, recalls the predicament that led BOKF to salesforce.com's door: “We needed to be able to share information within the sales teams—easily and consistently—and we needed to show management an accurate pipeline,” she explains. “Our former CRM systems were used by less than 50 percent of our commercial banking group. We knew we could do better.”

Since implementing Salesforce, BOKF has done better—much better. Today, more than 90 percent of its users rely on Salesforce to access and exchange critical customer information, at every stage in the business relationship.

### Easing Growth Pains

Much of BOKF's growth is due to acquisitions, which resulted in numerous front-office information systems. Before salesforce.com came on the scene, relationship managers had an incomplete view of their customers, reports were difficult to generate, and many CRM processes did not integrate with the bank's core banking system. In short, BOKF spent too much time gathering information to make business decisions. Outbound marketing campaigns were not well integrated with CRM processes.

BOKF wanted a cohesive, on-demand CRM solution that would be easy to use and maintain, while providing the relationship managers with a complete view into customer accounts and banking histories. Salesforce.com's Salesforce CRM met the organization's critical requirements, and it also delivered ad hoc reporting capabilities, fast integration with Microsoft Outlook, and the ability to leverage the bank's core systems via a secure architecture.

BOKF purchased 500 Salesforce licenses for its Banking and Wealth Management groups. It also engaged Successforce Consulting to host an Executive Workshop, conduct a business process review, assist with the CRM implementation, and help integrate the new software with its core banking system. Finally, BOKF enlisted Successforce Education to conduct a train-the-trainer program.

“Salesforce.com offered the best functionality in its class, along with a roster of training and implementation services to help us get started,” notes Charles Sparks, senior vice president of Commercial Operations at BOKF.

### Help from the Experts at Salesforce.com

Successforce Consulting helped the bank create a customized information architecture to accommodate a diverse set of CRM data and applications, thus aligning the bank's existing business processes with its planned CRM initiatives. The rollout took 150 days, which included five weeks of training.

### About BOK Financial Corporation

BOK Financial Corporation (BOKF) is a multibank holding company based in Tulsa, Oklahoma that operates in Oklahoma, Missouri, Kansas, Texas, New Mexico, Arkansas, Colorado, and Arizona. The company is a leader in commercial banking, consumer banking, mortgage banking, and wealth management. With more than 3,500 employees, BOKF has sustained 15 years of continual growth in net income and earnings per share and currently has more than \$16 billion in assets.

The BOK Financial team worked with the salesforce.com consultants to create sales-management dashboards that display current information in an intuitive, actionable format—including pipeline opportunities, deals won, trends, top performers, and adoption metrics. “Our executives want to know the status of any given relationship at any point in time,” says Sparks. “These dashboards within the application keep them in touch with this information at all times.”

Bank personnel got on board quickly, aided by a well-defined training program. To kick-start the adoption process, four employees attended the salesforce.com Administrator Workshop, where they developed their core skills. “We used salesforce.com’s material as a model for creating our own training sessions,” says Dreyer. “Salesforce.com also helped us customize the training program to accommodate our processes and terminology as part of a ‘train the trainer’ session.”

Meanwhile, other CRM stakeholders attended an Executive Workshop to learn how the new CRM software could be applied within all of their lines of business. “Salesforce.com helped us collaborate better, especially during the initial rollout,” says Sparks. “The business process review was a valuable investment. That’s where we laid out the CRM infrastructure and customized the application to each of our user groups. Successforce Consulting was absolutely critical to that meeting.”

### Results Through Integration

According to Sparks, integrating Salesforce SFA with the bank’s existing business processes was relatively easy. BOKF worked closely with salesforce.com to integrate and deploy the new CRM software. Salesforce.com also helped with the migration from the company’s three legacy CRM solutions. “The challenge came with connecting Salesforce to all our other sales processes,” Sparks says. “That’s where salesforce.com’s Professional Services was so helpful.”

BOKF operates in a highly regulated industry and must be extremely careful about what financial information it reveals through the CRM software. Salesforce.com helped accommodate its security requirements as part of the implementation.

BOKF is also integrating a proprietary commissions payment solution to Salesforce, which presents incentive information from the core systems as opportunities are closed. “We’ve done all the integration via Salesforce tabs and Web links to maintain a cohesive user experience,” says Sparks.

### Banking on the Future

Thanks to the concerted efforts of the CRM team and Successforce Services, overall Salesforce usage at BOKF has increased from 58 percent to 90 percent in just eight months. “Department managers and executives realize the power of dashboards and have become true believers in the application,” says Dreyer. “As a result, they are pushing our sales teams to use the software.”

The next phase in the Salesforce implementation will streamline case management for BOKF’s commercial customer service team, helping it meet the company’s vision of providing “nationally competitive products with the responsive customer service characteristics of a local bank.”

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