

Customer Success Story

CUSTOMER SIZE:

200-500

INDUSTRY VERTICAL:

Financial Services

SALESFORCE PRODUCTS:

FSC Cloud, Marketing Cloud and Mulesoft

INTEGRATIONS:

DocuSign, Alkami and MeridianLink

ENGAGEMENT LENGTH:

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SFFCU Partners with DynPro to FSC Implementation



SF fire credit union, dedicated to fostering financial success within the community. Serving both firefighters and residents of San Francisco, San Mateo, or Marin counties, they operate as a not for profit cooperative owned by their members,

Original Challenge: Prioritizing member first service, community engagement, and innovation.

The SF Fire faced challenges optimizing FSC Sales & Service Cloud Enterprise Edition, dealing with extended process complexity and integration issues with apps like MeridianLink, Alkami, and DocuSign, as well as Keystone and Key Bridge API connections

Outcome #1

A comprehensive solution was delivered by setting up Marketing Cloud and Salesforce Financial Services Cloud (FSC), along with seamless integrations to third-party applications using MuleSoft. This enabled streamlined marketing and financial workflows across systems.

Outcome #2

The MVP rollout included integration with data lakes and data warehouses, embedding them into core Salesforce