

Customer Success Story

CUSTOMER SIZE:

200 - 500

INDUSTRY VERTICAL:

Banking

SALESFORCE PRODUCTS:

Sales Cloud

SERVICES:

Management Consulting
Custom User Interface
Custom Application Dev
Data Migration

ENGAGEMENT LENGTH:

Ongoing - Additional
Projects in progress

TAB Bank Makes Salesforce Their One-Stop Commercial Lending Solution with Help From DynPro



Original Challenge

Established in 1998, TAB Bank is an online bank serving small businesses, families, and individuals nationwide. TAB Bank is technology driven and focuses on providing support to its customers in all stages of financial growth – throughout any economic condition.

TAB Bank was looking to grow their SF org by moving all commercial real estate lending operations out of spreadsheets and into SF. They needed a partner to help them make the big move and customize SF to meet their needs.

Outcome #1

Seamless Lending Process + SF ROI

TAB Bank is now managing all commercial real estate operations within SF. The DynPro team customized SF to generate unique loan numbers and created custom opportunity screens. TAB Bank is seeing their SF ROI very clearly as their team is working more efficiently than ever with live data in SF.

Outcome #2

Custom Application + Increased Opportunity Visibility

DynPro created a custom commercial real estate app in SF, so the TAB Bank team can access data without having to look in multiple places. The TAB Bank team now has readily available access to account records and can utilize custom fields to see opportunities – all within SF.

Outcome #3

Streamlined Sales Operations

DynPro reviewed TAB Bank's lead conversion process in SF for efficiency. They were able to eliminate some unnecessary fields and create more effective custom fields – streamlining Sales Ops!