Case Study — Banking & Fintech

Global Bank's Digital Transformation with Apromore and Salesforce

Accelerating replatforming and digital transformation through process intelligence and innovation

40% New Customer Acquisition

84% Process Automation

25% Reduced Fraud Incidents

Client

Industry

Banking & Financial Services

Geography

Global operations, headquarters in a major financial hub in APAC

Customer Base

Over 10 million retail and business customers in 25+ markets

Market Ranking

Top 50 global banks by market capitalization



Challenges

The bank was experiencing:

- **Eroding Market Shares:** Due to the rise of competitors with more advanced digital banking platforms, the bank's decades-old legacy systems and complex IT landscape were unable to keep pace with evolving customer expectations.
- **Inefficient Processes:** Critical retail banking processes like account creation, customer onboarding and loan origination were slow and error-prone.
- **Low Customer Satisfaction:** The above issues were significantly impacting customer satisfaction.
- **Risk of Fraud:** The bank faced increased risks of fraud in customer-facing processes like accounts creation.

Solution

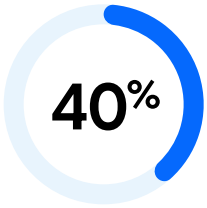
The bank faced time pressure to undergo a major digital transformation program, by building a new mobile banking experience aimed to improve customer experience and reduce IT costs. They partnered with Salesforce and Apromore, selecting Financial Services Cloud (FSC) to reengineer core retail banking processes. Apromore's roundtrip process mining approach accelerated the replatforming effort by:

- **Discovering & analyzing the current state:** Apromore automatically mapped processes from legacy systems, identifying system constraints imposed by the legacy tech stack, as well as bottlenecks and other friction points, which helped uncover opportunities for automation and improvement before replatforming.
- **Designing & simulating the new state:** Apromore helped design and simulate optimized processes, maximizing automation and minimizing manual intervention. Simulations considered resource workloads and seasonal factors to ensure scalability within Salesforce.
- **Monitoring the new current state:** After implementing the new processes in Salesforce, Apromore monitored their performance, comparing actual results with simulation expectations to drive continuous improvement. Apromore's analytics tracked performance and compliance trends, enabling early detection of potential fraud risks, leading to preventive mechanisms during account creation.

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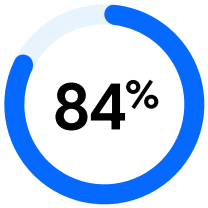
Results

The bank achieved significant improvements across multiple key areas:



New Customer Acquisition

Thanks to the newly digitized processes, 40% of the customers using the bank's digital platform were new to the bank. The seamless experience and reduced processing times helped the bank regain critical market share.



Process Automation

Critical processes, like loan origination, achieved 84% automation, cutting error rates and processing times. The bank reduced loan processing from 50 hours (1 week) to just 7 hours (single-day approval)—an 86% improvement in end-to-end handling time.



Reduction in Fraud Incident

The bank minimized fraud-related risks in account creation, which directly translated into millions saved in potential regulatory fines. Automating the monitoring and reporting of compliance data also led to faster responses to regulatory changes.



Improvement in Reporting Efficiency

By automating compliance reporting, the bank cut down manual effort by 40%, allowing teams to focus on higher-value activities. This improvement not only saved costs but also improved audit preparation times, ensuring timely compliance.

Significant Reduction of Replatforming Time

Apromore's discovery, analysis and simulation capabilities helped the bank identify and address potential issues before migrating to Salesforce, leading to a much faster and smoother replatforming experience.

Conclusion

By leveraging Salesforce + Apromore this bank was able to replicate and build upon those proven strategies, accelerating its own digital transformation journey and positioning itself as an innovative leader in the competitive digital banking landscape. The bank created a sustainable in-house capability through the establishment of a Center of Excellence in Process Intelligence, ensuring continuous process optimization via the roundtrip process mining approach.

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