



Fieldpoint Private digitizes the customer banking experience to build loyalty and engagement

Fieldpoint Private is one of the fastest growing private banks for ultra-high net worth individuals. Its founders—some of Wall Street's most respected executives—sought to create a financial firm completely attuned to people's individual circumstances.

Personalisation was a key goal but the firm also needed a way to service clients more efficiently. The solution? A new website, customer portal and intranet built on Stantive Technologies Group's OrchestraCMS - the only digital experience platform built 100% native on Salesforce.

"Using OrchestraCMS, we've been able to create an exceptional customer experience that's on par with what's offered by institutions spending millions more on technology," said Michael White, Chief Marketing Officer of Fieldpoint Private. "It helps us to differentiate ourselves and ensure customer loyalty, both of which are critical to our success."

Fuelling growth and customer success

- OrchestraCMS powered sites streamline access to a number of services, from social feeds to banking apps
- Customers benefit from a single, unified experience and the ability to self-service
- Employees and advisors can better collaborate around customer needs
- The solution has supported Fieldpoint Private to massively grow its business while keeping a tight reign on IT costs

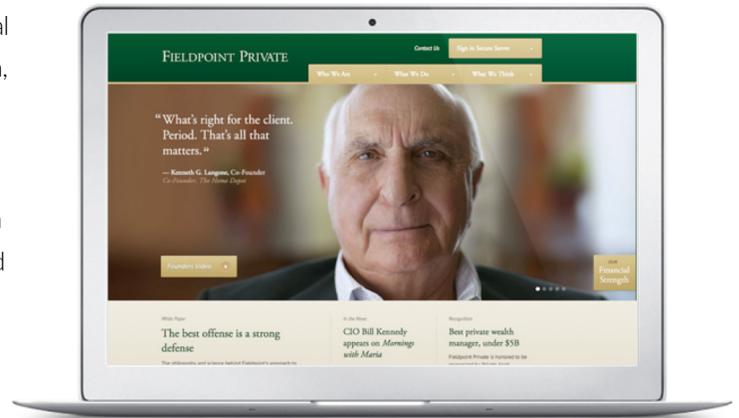
Building on the cloud

Fieldpoint Private opened its doors just as the 2008 financial crisis was unfolding. When it came to building out its IT infrastructure, the founders knew they needed to keep costs under control. They also wanted to invest in technologies that would support collaboration around client needs. Cloud-based platforms like Salesforce and OrchestraCMS proved ideal, helping the firm manage its costs and giving it flexibility to scale.

OrchestraCMS also provided an opportunity to create a compelling digital experience for customers, uniquely combining content with business data, processes and applications.

Fieldpoint Private needed a public website to engage potential customers and a personalized portal where existing ones could self-service. The firm also wanted to build a social intranet where employees and advisors could access the resources needed to manage customer portfolios.

Its objectives were achieved in just 12 months with OrchestraCMS used to build and manage all three sites.



A unified experience across multiple channels

Fieldpoint Private's public website features mobile-enabled design and uses rich multimedia content to highlight the firm's services. It also provides a gateway to the customer portal and social intranet. Users simply log in once and with Single Sign On gain access to a number of services and applications. Exactly which applications each user can access is determined by their profile within Salesforce.

The customer portal and social intranet integrate a number of services and applications, from social feeds through to banking and investment apps. Customers can log on to complete a transaction or update their account details. Any changes made within the portal are updated automatically in Salesforce. This means there's just one touch of the data and no re-keying.

Employees and advisors connect via the intranet to collaborate on customer portfolios and manage support cases. As OrchestraCMS is 100% native on the Salesforce platform, Salesforce workflows and approvals are built right-in, maximizing efficiency.

Simplified publishing for real-time content delivery

OrchestraCMS has helped Fieldpoint Private re-think the way it manages content and engages with its most important audiences. It has set up publishing workflows and approvals for each of its channels and delivers all research and advisory news through the portal.

News feeds are customized and integrated with financial management tools. Social feeds add another layer of engagement, with the CIO and other executives able to connect and communicate with customers directly.

All these features help to create a streamlined and personalised experience for the ultra-high net worth market. What's more, fewer than five employees manage the entire infrastructure and content is authored and published from groups across the firm. It's an agile approach that allows for real-time content delivery, completely independent from IT.