Financial Services

PARTNER

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We help you thrive.

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Introducing **Consleague**

We help organisations grow, using Salesforce to deliver dynamic change across Sales, Marketing & Customer Experience. As a dedicated Salesforce partner offering consultancy, configuration, design and development, we empower you to make the right decisions.

At Consleague, we take the time to listen and provide assistance in arriving at a strategy that works best for you.

We offer services that spearhead your day-to-day work challenges into manageable techniques, processes and strategies that contribute tseamless integration and implementation.

Financial Services Consultancy

Our financial services consultants have been providing Salesforce best practice expertise, resources and methodologies in this industry for over 15 years, with a particular focus on the delivery of solutions to the following types of clients:

- Retail Banking
- Investment Banking
- Payment Orchestration
- Wealth Management
- Asset Management
- Insurance
- FinTech

Our mission for our financial services clients is to accelerate business value through the delivery of industry-focused solutions, aligning your goals and ensuring your Salesforce adoption is a success both strategically and operationally.

We are perfectly placed to advise our clients on topics including but not limited to:

- Governance
- Adoption
- Organisational Change Management

While this skillset enables us to deliver robust technology solutions that meet your demands, we have also developed several market-specific accelerators enabling us to build out solutions designed to meet the needs of our financial services clients out of the box quickly.

Insurance Markets

We are able to simplify complex systems and reduce technical debt through the delivery of market-leading insurance solutions alongside robust regulatory compliance.

Single Source of Truth

Whether you are selling direct to consumer or through an intermediary, our solutions provide you with a holistic view of the customer, their products and services and a clear indication of white space opportunities.

Increase Productivity

Our solutions ensure your team are able to spend more time providing value to your customers rather than orchestrating cumbersome, time-consuming processes, increasing value and reducing operational overheads.

Robust Pricing

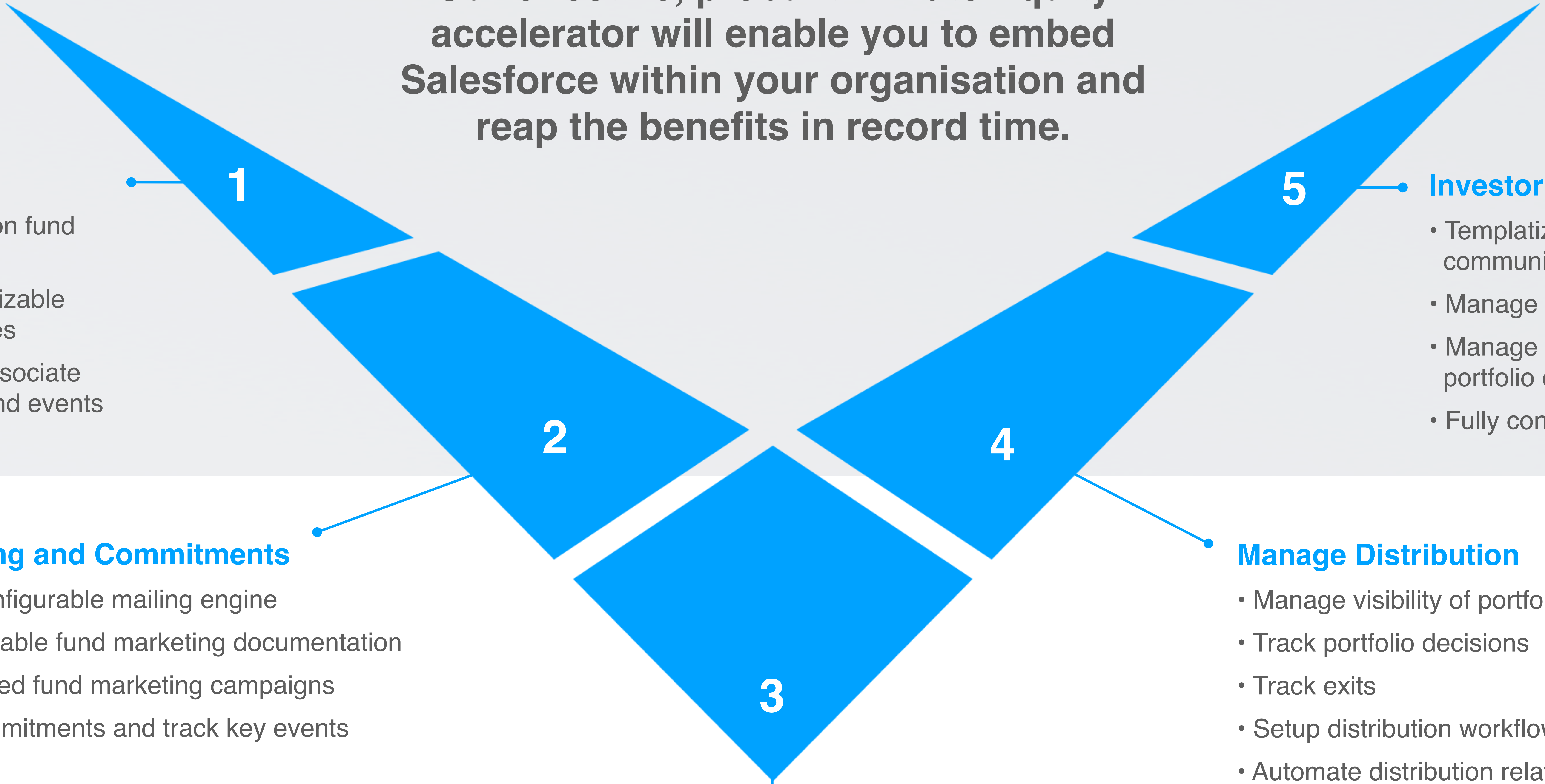
We have a wealth of experience in the creation of automated pricing and underwriting engines to ensure that your solution is fast, robust and consistent. This approach has enabled us to provide a complete solution for the insurance market, delivering value.

Process Automation

We believe that our solutions should automate processes and allow your most valuable assets (your people) to focus on meaningful, rewarding activities that add value to the customer and increase satisfaction and retention.

Private Equity/VC Accelerator

Our effective, prebuilt Private Equity accelerator will enable you to embed Salesforce within your organisation and reap the benefits in record time.



Setting Up Funds

- Support for all common fund types and structures.
- Utilises easily customizable configuration templates
- Manage workflows associate with key dates and fund events

Marketing and Commitments

- Fully configurable mailing engine
- Configurable fund marketing documentation
- Automated fund marketing campaigns
- Log commitments and track key events

Capital Calls and Drawdowns

- Make capital calls
- Manage audit trail of drawdowns
- Manage capital deployment

Manage Distribution

- Manage visibility of portfolio companies
- Track portfolio decisions
- Track exits
- Setup distribution workflow
- Automate distribution related communications

Investor Relations

- Templatize all standard client communications
- Manage regular performance reporting
- Manage bulk email by fund or portfolio company
- Fully configurable mailing engine

Wealth & Investment Management

We are pleased to be able to offer the opportunity to utilise our Financial Services Cloud to manage products, customers, platforms, portals and data.

Market Changing

Great new advantage for advisors to respond to clients with automated workflows and simplified processes.

Single Customer View

Compose a powerful single view of the customer integrated with market leading wealth management partners.

Increase Performance

Increase advisor performance and knowledge with interconnected information dashboards.

Finding Space

Identify and explore sales space opportunities through automated white space analysis.

Supported Throughout

Implemented, integrated and maintained by **Consleague** throughout your engagement with us.

Meaningful Insights

Provide market backed meaningful recommendations based on customer data.

Investment Banking

With Consleague, investment banking businesses can now track sales, purchases, ongoing revenues and costs whilst maintaining a complex data model that drives sales and valuation processes.

Client Landscape
Clients now require a global platform that provides cross-region and cross-product views of commercial relationships regardless of whether they are investment banks, financial institutes, fixed income capital markets, transactional banks or derivatives.

Data Management
We are now able to resolve data sharing between business units and their respective teams with a level of unparalleled transparency, de-duplicating historically fragmented client data to provide a clear holistic overview of all pertinent information.

Meeting Regulatory Demands
We have delivered a multitude of innovative and market-leading solutions to address the increasing demand from the regulators. These solutions apply automation and risk-based portfolio management to ensure that your business remains compliant.

Salesforce To The Core
By building our solutions on the Salesforce core, we offer assurance that no matter what the future may hold, we are able to respond, innovate and deliver solutions that will make a positive difference in a commoditized market.

The UK Engagement Team

From our inception over 10 years ago, **Consleague** has built a reputation for creating and implementing the delivery of reliable, integrated Salesforce solutions to many delighted customers by leveraging technology to improve operational efficiency.

This success has required us to develop and maintain a number of core strategic business functions and as of 2019, we have grown to over 45 talented full-time staff in the

UK and offshore, providing our clients with the solutions and support they need in a cost-effective and timely manner.

Our Approach

We place our clients' needs at the forefront of all we do. It has always been **Consleague's** belief that focusing on a small number of clients rather than juggle high volume activity would enable us to build meaningful, lasting and results oriented relationships with our clients. We're thrilled that the approach continues to produce undeniably beneficial results.

Our team are experienced in every aspect of business, having built and consulted successful businesses and assisted FTSE listed organisations in achieving efficient, productive and profitable growth.

We have built, refined and perfected an engagement model that realises the true benefit of a specialised and scalable offshore team alongside a dedicated and experienced onshore team.

How do we do this?

Discovery
We facilitate workshops that allow us to find out as much as possible about you, your business and your concerns. In these sessions, we hone in on information regarding your current business processes and wider business strategy. We then align that understanding to technology. These sessions form the foundation of which solution we tailor for your business.

Playback and Propose
Following the initial consultation, this is our opportunity to demonstrate that we have understood your business and concerns fully. In these sessions we playback our understanding alongside a structured set of recommendations and where appropriate, a proof of concept that brings to life our shared vision for your business.

Scope and Planning
During this phase, we conduct requirements gathering workshops where granular details are agreed upon. These are translated into scoping documents. Alongside this activity, we produce full delivery plans that timetable the project.

Delivery
As we move into delivery, our agile expertise comes into play utilising SCRUM or KANBAN. We believe that delivery is best achieved in chunks resulting in useable units of work being delivered in iterative sprints. This approach provides flexibility alongside robust and transparent delivery.

UAT and Handover
At this stage, our team performs detailed quality assurance before hand over to you commences. Once the handover is completed, we work with you to ensure that UAT can be completed as seamlessly and effectively as possible. We also handle go-live and provide ongoing support to ensure uninterrupted production usage.

We are committed to delivering excellence in every engagement. Based on our understanding of your challenges and desired outcomes, we are confident we can provide the relevant expertise to assist you in delivering a technology and enhancements solution that will enable you to accelerate your business forward.

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For us, our engagement with you is the beginning of a journey.

We pride ourselves on not jumping straight to a solution without truly immersing ourselves in every facet of your business and ensuring that we position ourselves as the partner that will assist you in achieving your strategy and the results you want.

This approach delivers a level of excellence that sets us aside from our competitors and continually delights our customers. Why not talk to us to find out why?

Ready to start?

Schedule a call now with one of our Solution Experts to discuss your ideas in more detail.

Schedule a Call

Headquarters
No.1 Poultry, London EC2R 8EJ

Email
info@consleague.com

Phone
+44 (0)203 371 1046