



BANKING  
CLIENT

## HAPPY CLIENT STORY

Implementation of Oracle Sales Cloud.



## AT A GLANCE



**Who**  
Credit Union



**Location**  
San Francisco



**Industry**  
Banking

# BANKING CLIENT

## ABOUT THE CLIENT

### ABOUT THE CLIENT:

Client is an award-winning credit union that continues to focus on elite member service while providing valuable products and services in the San Francisco area.

They aim to improve people's lives with a full line of financial products and services, while providing excellent rates, low fees, 24/7 access and personalized member service.

# What was implemented?

## ONE

Critical River helped Client to transition from ACT CRM to Oracle Sales Cloud to improve management of Leads, Accounts, Contacts and Opportunities in under 2 months.

Oracle referred Critical River to Client to implement Oracle Sales Cloud.

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## TWO

Critical River implemented in TEST/DEV environment and after UAT approval migrated to PRCOD environment.

Rapid deployment Of Marketing and Sales capabilities with minimal impact to IT support and infrastructure resources.

# Results Achieved

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Enabled streamlined capability for entering member product interest during on-site visits

Improved visibility for sales management Of sales opportunity status for companies and members

Utilizing Oracle Social Network capability to notify internal departments of member product interest

Able to measure member lead-to-opportunity conversion rates



**CRITICALRIVER**  
INSIGHT • EXECUTION • RESULTS

## AT A GLANCE



**Timeline**  
week project



**Deployment At**  
North America



**Industry**  
Banking



**Products Implemented**  
Oracle Sales Cloud

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## ABOUT CRITICALRIVER



## ABOUT CRITICALRIVER:

CriticalRiver is a trusted technology partner for comprehensive Oracle Consulting and Development services across the globe.

With their highly experienced team, they prioritize understanding client needs and industry best practices so as to approach any problem with insight and careful strategic planning.

CriticalRiver is an Oracle Gold Partner.

Other brands we have worked with

HAPPY  
CLIENTS  
STORIES







# BANKING CLIENT

Client Reference Available  
on Request

Talk to us:

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<https://www.linkedin.com/company/criticalriver-technologies/>

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