

## Go live on Salesforce FSC —fast, with a purpose-built accelerator

Salesforce FSC offers a flexible foundational industry capabilities for Banking — but the needs of commercial banks are complex in nature and without the right configuration and guidance most banks struggle to stand up a solution that unlocks value. Lakeworth’s Commercial Banking Accelerator addressed that by via pre-defined process flows, relationship models, workflows and dashboards designed based on prior implementation experience.

Designed by former Salesforce ProServe leaders, this accelerator removes the guess work and increases time to value — be it be for your initial MVP build or for Continuous Innovation.

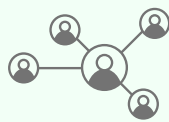
## FSC Accelerator Kit for Commercial Banking

**For commercial banks seeking to make most of FSC and driving CRM adoption**

Lakeworth’s FSC Accelerator for Commercial Banking delivers a fully-configured jumpstart tailored to the workflows of Relationship Managers, Commercial Banking Officers. It includes relationship 360 views, deal tracking, and referral management built to accelerate sales cycles.

### Lakeworth FSC Commercial Banking Accelerator

#### Commercial Banking Accelerator Key Functional Areas



#### Relationship & Group 360

Household views with business entities, key stakeholders, and COIs.



#### Pipeline MGMT & Forecasting

Track sales activities with minimal data entry, Forecast confidently.



#### Exposure & COI Mapping

Understand cross-entity exposure and expand key relationships.



#### LOS / DAO Integration

Seamlessly connect FSC to credit, approval, and origination systems.

#### What You Get



#### Banker Console

Role-based UI for RMs and other roles



#### Forecast Dashboards

Deal pipeline, demand forecast, performance



#### Relationship Models

Relationship hierarchies for house-holding views



#### Product Penetration Insights

whitespace visibility, product recommendations

### Business Benefits

- Built on Salesforce FSC and aligned to Salesforce roadmap
- 30–40% faster go-live compared to traditional deployments, success assurance
- Designed for adoption with console-ready UX
- Tailored commercial banker, RM workflows
- Pipeline visibility + whitespace analytics

### Accelerator Value

- Designed based on Customer Input
- Pre-defined layouts, data models, and flows
- Dashboards for RMs, Managers, Execs
- Relationship grouping with exposure logic
- Whitespace analytics and referral tracking
- DAO and LOS integration framework
- Embedded next-best actions and alerts



Financial Services Cloud



LW CB Accelerator

Financial Services Cloud

Salesforce

40% ↓

reduction in implementation costs

### About Us

Lakeworth Digital is a boutique Salesforce consulting partner founded by former ProServe leaders. We specialize in helping banks, credit unions, and financial institutions maximize platform value—faster.



Project Reviews



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“Lakeworth Digital’s expertise in FSC Implementation and deep knowledge of Financial Services significantly accelerated our Salesforce implementation. From day one, they collaborated seamlessly with our teams and stakeholders, delivering strategic outcomes efficiently.”

- Head of Salesforce Platform, Banking Customer

