



Retail Banking Accelerator

On Salesforce FSC: Built for Member Experience. Engineered for Scale.

Retail Banking Accelerator for Salesforce FSC

Go live faster with a pre-built solution designed for the realities of frontline banking.

Salesforce FSC provides a flexible foundation—but most retail banks struggle to configure it in ways that drive real adoption and value.

Lakeworth’s Retail Banking Accelerator delivers a fully-configured jumpstart built for the day-to-day work of Tellers, Branch Managers, and Contact Center Agents.

With pre-built consoles, onboarding journeys, and referral tools, your teams can serve faster, sell smarter, and simplify operations—starting day one.

What you get

Role-Based Consoles
Teller, Branch, Contact Center views

Client + Household 360
Unified relationship view and holdings

Onboarding Journeys
Account opening, KYC, AML, service

Product Insights
Penetration, whitespace, cross-sell

Referral Tracking
In-branch and digital referral flows

Contact Center Flows
360° service + integrated case routing

Key Functional Areas

- ✓ Pre-built Teller & Contact Center Consoles

✓ Client + Household + Product Models

✓ Cross-Channel Service Workflows

✓ Account Opening & Onboarding Journeys
- ✓ Deposit + Card + Loan Application Flows

✓ Referral & Lead Capture

✓ Whitespace & Next-Best Product Insights

✓ Integrated KYC & AML Screening

Accelerator Value

FSC-Aligned Foundation	Built natively on FSC and aligned to the retail banking roadmap
Faster Time to Value	30–40% faster go-live vs traditional implementation
Designed for Adoption	Role-based UIs with branch, teller, and agent workflows
Growth & Retention	Embedded referral tracking, whitespace, and product penetration dashboards
Risk & Compliance	Automated onboarding, KYC, and AML flows
Analytics-Ready	Dashboards for referrals, product mix, and team performance



About Us

Lakeworth Digital is a boutique Salesforce consulting partner founded by former ProServe leaders. We help banks and wealth firms unlock value with focused, nimble, expert-led execution.



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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