Who is Citizens Bank?

Citizens Bank is the 12th largest retail bank in the United States and delivers a broad range of retail and commercial banking products and services to over 5 million individuals, companies, non-profits, and institutions.

Products:
Sales Cloud
Einstein Analytics

Citizens Bank uses Einstein Analytics to deliver tailored solutions and expertise.

As part of the bank’s ongoing journey toward delivering valuable ideas and improving the customer experience, Citizens has customized the Einstein Analytics platform so its commercial bankers have a more complete view of clients’ needs and can deliver the right solution at the right time. These tools provide bankers with a real-time view of each relationship, helping them deliver the combined strength of the entire bank to each client.

“Citizens Bank has customized Einstein Analytics to deliver best-in-class business intelligence, helping our customers and colleagues reach their potential.”

–MARK VALENTINO, MANAGING DIRECTOR
Citizens bankers deliver long-term value for clients by providing sound expertise and tailored solutions throughout the lifecycle of their clients’ business. When that expertise is paired with cutting-edge business intelligence, the added value is substantial. The client-facing bankers at Citizens have always been known for reliability, professionalism, and understanding. Now that these experienced bankers have a one-stop-shop solution for market coverage, pipeline, and goals, they’re able to not only utilize this information to improve their own performance, but also to spend more time meeting face-to-face and providing insights to their prospects and clients.

Einstein Analytics empowered in-house developers at Citizens Bank to create customized views for each level of the organization. This enabled the team to create a series of dashboards based on specific use cases. A client-facing banker is able to track deals in their pipeline, market coverage for assigned prospects and clients, and results/wins to date. A regional manager can see the same information, but summarized for each banker, with details available as well through dynamic filters and tables. Each level of the organizational hierarchy has a specific view, all sourced from the same underlying datasets.

“Citizens Bank has utilized Einstein Analytics to provide insights at my fingertips to easily get a pulse on my teams’ effort and production.”

—CHAPIN BATES, REGIONAL EXECUTIVE
Citizens Bank delivers superior end-to-end customer experiences by using the most innovative solutions to drive even stronger performance.

The key to technological innovation is meeting rapidly evolving customer needs. Today, customers seek easy access, speed, and efficiency. Beyond simply having the latest technology, Citizens’ ability to enhance the customer experience through innovation has positioned the bank as an essential partner. The ongoing digital transformation allows the bank to better understand customers and more effectively deliver tailored advice, ideas, and solutions. Einstein Analytics has provided Citizens with a one-stop portal that delivers valuable insights in the form of strategic dashboards, customized tables, and dynamic charts. With these new tools, colleagues are collaborating to deliver a more holistic customer experience. Einstein Analytics allows developers to consolidate data from multiple sources, transform that data with underlying calculations, and produce datasets that deliver valuable information to its bankers’ fingertips. Citizens’ bankers gain efficiencies through this centralized hub of business intelligence, available at their desks or on the road, updated frequently and autonomously.

“Through Einstein Analytics we have created customized dashboards using myriad internal sources, built entirely in-house in an agile, adaptive environment.”

—SHARDA RAO, SENIOR ANALYST
Citizens is always seeking the best technology solutions to help power and accelerate its data-enabled strategy.

Citizens’ Bank is continually exploring potential technological opportunities, all the while vetting the most promising offerings to ensure delivery of the best solutions to its clients. By partnering with creative thought leaders like Salesforce, the bank is able to execute with greater speed and agility. In addition to helping the bank improve efficiency, Einstein Analytics has helped facilitate a consistent and common language around data and insights, enabling more real-time and effective commercial action. One of the most attractive advantages of working with Einstein is that it is so user-friendly that Citizens’ developers, with the help of our Technology Services department, were able to build customized dashboards and reports completely in-house.

The Citizens Bank Technology Services team works closely with the business line to cooperatively address roadmap planning, platform support, and ongoing delivery of key strategic priorities. With a focus on continuous improvement, data quality, and security, this technical team delivers monthly releases that support the vision of a customer-focused sales and service platform, providing sales team with enhanced tools and data, along with streamlining the sales, service, and onboarding processes. New capabilities, such as containerized mobile enablement, customer 360-degree view, integration/data feeds with and from numerous bank and external systems, and Einstein Analytics enablement were brought to fruition based on the close and strong partnership between business and technology teams.

“The investments that Citizens Bank has made in big data and AI technologies have enabled us to become more strategic advisors for our customers. Never before have I heard such positive feedback from the business lines.”

—GEOFF GUNTER, SENIOR VICE PRESIDENT, COMMERCIAL TECHNOLOGY
Citizens continues to build the essential foundation for innovation by fostering a culture that prioritizes digital-savvy talent, development, and continuous improvement.

Driving a mindset focused around modernization, the bank is focused on improving the client experience. By leveraging innovation, Citizens is setting the stage for a streamlined, technologically savvy approach to financial service. Einstein Analytics is helping its bankers gain additional insights into market coverage, industry trends, and sales results.

Citizens’ developers spent months meeting with dozens of colleagues during development, identifying use cases and evolving the platform. Working so closely with the pilot group ensured that expectations were being met, and later exceeded. Since its release, adoption has remained strong as regional managers have championed Einstein Analytics and the value it brings to their teams. Regional executives have continued to push the development team to create new solutions, which will further improve adoption, understanding, and evolution.

“Going forward, Citizens Bank will continue to iterate, improve, and expand Einstein Analytics with the goal of delivering tailored solutions and expertise to our colleagues.”

–BRIAN ANTONIO, SENIOR SALES EFFECTIVENESS MANAGER
Salesforce Customer Success Story: Citizens Bank

CHALLENGE
Data required manual consolidation before presentation to bankers
Spreadsheets distributed weekly did not always provide real-time data
Key stakeholders lacked a one-stop analytics hub of results and insights
Alternative vendors did not meet requirements for an agile, affordable solution

SOLUTION
Customized dashboards for specific teams and roles using myriad internal solutions
Empower regional leaders to evaluate team performance with live data and dynamic views
Generate insights around market coverage, pipeline, activities, and results versus goals
Enable collaboration among bankers to deliver more holistic, tailored solutions

RESULTS
140 hours of time saved per week
8,000 spreadsheets per quarter eliminated

PRODUCTS
Sales Cloud
Einstein Analytics

Salesforce is the leader in enterprise cloud computing. We help companies connect to their customers in a whole new way with our sales, service, marketing, community, and analytics apps. All of these apps run on the Customer Success Platform, so you can manage all your information in one place. To learn more, call us at 1-800-667-6389.