

A Guide to the Top
Financial Services Apps
for Commercial Banking
on the Salesforce AppExchange

The Financial Services section of the AppExchange provides managers, advisors and brokers with a wide selection of solutions to help optimize processes, maximize efficiency and productivity, and ultimately increase profitability. With so many applications available, choosing the right one can be a daunting task. To get the most out of your investment, it's important to select the solution that best fits the need of your organization, industry and employees. Being able to differentiate and identify the solutions that will add relevant capabilities is key in that evaluation.

This guide evaluates apps based on how useful they are for managers and advisors in the commercial banking sector. Each of the following apps received a rating of five stars and a minimum of two reviews on the AppExchange. They are evaluated on the following categories and criteria:

CRITERIA TO DETERMINE APP SOLUTIONS FOR COMMERCIAL BANKING

	Level of Integration	Level of Accessibility	Scope of Features
RED	Salesforce only	Salesforce	Narrow, single functionality or task
YELLOW	Salesforce and 1-2 other integrations	Available outside of Salesforce (e.g., via Chatter)	Midrange functionality that encompasses 2-3 functional features
GREEN	Salesforce and 3+ other integrations or customized integrations	Available outside of Salesforce with 1+ native mobile app	Broad range functionality can be used across business functions

Based on the identified criteria, the chart below indicates each app's score for the individual criterion, as well as the overall solution score.

	Level of Integration	Level of Accessibility	Scope of Features
Seismic: Enterprise Document Generation	●	●	Broad
NetDocuments For Financial Services - Compliant Document Management	●	●	Mid
CipherCloud for Salesforce	●	●	Mid
Mortgage Planner CRM	●	●	Broad
LASER Credit Access Experian™, Equifax® or TransUnion®	●	●	Narrow
nCino LLC	●	●	Mid
ezCloudAudit	●	●	Mid
XLR8 CRM for Financial Advisors	●	●	Broad
Market Builders - MMD	●	●	Broad
Direct Mail & Dynamic Collateral Fulfillment	●	●	Mid
ProcessComposer	●	●	Narrow
Gryphon's Core CRM - Do Not Call, Do Not Email Compliance Solution	●	●	Narrow
Laser App Enterprise Connector	●	●	Narrow
ProfitGuard	●	●	Narrow
ONE Correspond for Salesforce	●	●	Narrow
S4G's Automated Currency Updater	●	●	Narrow
Risk Manager	●	●	Narrow
Communication DNA	●	●	Narrow
Global Currency Updater	●	●	Narrow

EVALUATION PROFILES

For a more in-depth view into the individual applications, the following profiles break down each category to provide more insight into their capabilities.

Seismic: Enterprise Document Generation

Testimonial

“Seismic is a reliable reporting tool that pulls data from our Salesforce database into neatly built PowerPoint presentations. This has helped our Sales team to cut meeting preparation time by 25% and saved over 144 person-hours of work per quarter.” – *Gaurav Pimprikar, GE*

Integration

Salesforce, Microsoft Office, enterprise cloud systems such as ERP, BI warehouses, S&P Capital IQ.

Accessibility

Web-based application that can be accessed through SharePoint, IE 7-10, Firefox, Chrome and Safari 5-6, as well as tablet applications for iOS and Windows 8.

Scope of Use Cases

Create, build and manage custom presentations, collateral and contracts for every sales scenario. Sales has access to a central repository of all approved marketing materials. Marketing is 5x more efficient, can track usage, while all disclosures are automatically included, ensuring compliance.

NetDocuments For Financial Services – Compliant Document Management

Testimonial

“The product is tightly integrated into the Microsoft product suite and Salesforce. It works inside and outside of Salesforce. It provides a secure collaboration environment for internal team members and external constituents. It's provided us with high-end document management functionality without the high-end price. I couldn't recommend it enough.” – *Deryck Jones*

Integration

Salesforce and Microsoft Office

Accessibility

Salesforce and mobile

Scope of Use Cases

Full-text and metadata searching, unlimited collaboration; user management and access rights; meet regulatory SEC compliance requirements, preserve in a non-rewriteable, non-erasable format (Write Once Read Many [WORM] devices); establish records retention policies to preserve digital records and retention periods based on various document types

CipherCloud for Salesforce

Testimonial

"Ciphercloud Encryption for Salesforce helped our German-headquartered enterprise customers to securely share information on Salesforce with their global divisions – without the fear of breaking regulatory requirements, respecting local laws, and with the peace of mind regarding the U.S. PATRIOT Act and our data." – *Thorsten Claus*

Integration

Salesforce and external cloud application, database, and third-party AppExchange solution

Accessibility

Salesforce and mobile

Scope of Use Cases

Encrypt or tokenize customer data using standard AES-256 encryption, set flexible security policies on a per field basis, including powerful content-aware encryption to secure data automatically, detailed audit monitoring provides visibility into cloud usage, security and content

Mortgage Planner CRM

Testimonial

"MPC makes the hardest part of loan origination, staying in touch with prospects and former clients, easy. Instead of battling to reach out to them, MPC does the heavy lifting

with their email templates and email drip campaigns." – *David Bellinger*

Integration

Salesforce CRM Overlay, Chatter, integrates with Microsoft Outlook and the Google Apps such as Gmail, Google Docs, Google Calendar and external mortgage loan software systems such as Calyx and Encompass

Accessibility

Salesforce application and mobile browsers

Scope of Use Cases

Automates the loan workflow, creates and reports on borrower opportunities and annual equity review reports, has pre-built email Marketing Campaigns, centralized document manager and integrates with Chatter for customer communication

LASER Credit Access Experian™, Equifax® or TransUnion®

Testimonial

"I love LaserApp because I hate filling out forms. Once I got the basics mapped, I added custom fields in Salesforce and mapped almost everything LaserApp had to offer so that I never have to fill out another form again." – *Rosie Faifua-Cortez*

Integration

Salesforce and Experian, Equifax, TransUnion

Accessibility

Salesforce

Scope of Use Cases

One click on the contact page populates the credit profile data and retrieves a PDF of the personal credit report; data can be used in reports, marketing campaigns and to fulfill regulatory requirements

nCino LLC

Testimonial

"The nCino product allows us to operate within a single platform, which in turn has allowed us to reduce document/policy exceptions to below 7%, reduce loan closing times by 35%, and to have current/satisfactory quarterly financial statements from 94% of all existing customers. The transparency provided by this solution has really changed the culture of our bank." – *Chad Reed*

Integration

Salesforce CRM Overlay, integrates with the bank's core system

Accessibility

Salesforce and mobile browsers

Scope of Use Cases

SOC 2 Type 1, 2 and 3 compliance reporting, document manager, manage regulation and compliance

ezCloudAudit

Testimonial

"This application has allowed us to monitor our system, to create detailed access reports and to create real-time alerts (emails) when sensitive data is viewed. This functionality is crucial to our company. We are extremely happy with this solution!" – *Bo Wang*

Integration

Salesforce and Microsoft Outlook

Accessibility

Salesforce

Scope of Use Cases

Monitor Salesforce user activity; establish an audit trail that conforms to security and sharing rules

XLR8 CRM for Financial Advisors

Testimonial

"We have found the Process EZ linear process tool super easy to use and a great stepping stone for firms looking to build more complex workflows in the future." – *Jennifer Goldman*

Integration

Salesforce CRM overlay and Microsoft Outlook

Accessibility

Salesforce

Scope of Use Cases

Build account information and relationships under a single record, modules created to facilitate the management of household wealth; process management

Market Builders – MMD

Testimonial

“Adding the MMD integration was a big benefit for our marketing team, and Market Builders has done a great job of helping us display the data we need and eliminate duplicates, which is a crucial issue.”

– Sloane Payne

Integration

Salesforce and Microsoft Outlook

Accessibility

Salesforce

Scope of Use Cases

Store all of the data on Plan Sponsors, Financial Consultants and Investment Managers that is provided by the S&P Money Market Directory Pensionscope database, reporting and analysis; create mass marketing programs, access and analyze competitive information on other Investment Managers and their clients

Direct Mail & Dynamic Collateral Fulfillment

Testimonial

“Print Sf enabled our direct mail with a personalized, Web-based response site that submitted responses in real time into our Web-to-lead workflow. This was very valuable in closing the loop on our direct mail responses and allowing us to use workflows and triggers to notify our sales team in real time on direct mail responses.” – Scott Miller

Integration

Salesforce and Microsoft Outlook

Accessibility

Salesforce

Scope of Use Cases

Delivers integrated document personalization, direct mail marketing and collateral on demand to execute collateral and direct mail programs inside Salesforce.com

ProcessComposer

Testimonial

“This tool will help companies clearly define and streamline their processes which results in increased revenues and satisfied employees and customers. I highly recommend this tool for everyone!” – Brooke Chace

Integration

Salesforce and Microsoft Outlook

Accessibility

Salesforce

Scope of Use Cases

Process automation in custom objects, opportunities, cases and campaigns

Gryphon's Core CRM – Do Not Call, Do Not Email Compliance Solution

Testimonial

"Privacy Advisor has provided our company with a great tool for real-time scrubbing of our phone numbers for our call center. This is an excellent product which helps protect any company that could potentially run into issues with DNC lists by calling outbound."

– Keith Sadler

Integration

Salesforce CRM Overlay and Microsoft Outlook

Accessibility

Salesforce

Scope of Use Cases

Certifies and manages co compliance for phone, email, mail, and fax and applies all legal exemptions, bulk certify leads without exporting lead lists, view opt-out details and update in real time

Laser App Enterprise Connector

Testimonial

"I love LaserApp because I hate filling out forms. Once I got the basics mapped, I added custom fields in Salesforce and mapped almost everything LaserApp had to offer so that I never have to fill out another form again."

– Rosie Faifua-Cortez

Integration

Salesforce

Accessibility

Salesforce and mobile

Scope of Use Cases

Automated form-filling

ProfitGuard

Testimonial

"Its pricing methodology is easy to grasp. Separating the interest rate risks makes a big difference when tracking profitability contribution of individual lending opportunities." – Samuel Helwig

Integration

Salesforce

Accessibility

Salesforce, Chatter

Scope of Use Cases

Estimates profit contribution for every lending opportunity; leverages Chatter to talk to users about loan opportunities

ONE Correspond for Salesforce

Testimonial

"Great to see a document management application native to Salesforce. No more swapping between applications to get professional-looking correspondence out to customers. With the added benefit of creating templates, batch processing, user editing security controls and complete data integration ONE Correspond should be the app of choice for any user serious about maintaining a professional look." – *Greg Baxter*

Integration

Salesforce

Accessibility

Salesforce application that is optimized for Internet Explorer 8 and 9 and Chrome

Scope of Use Cases

Use Salesforce data to build customer communications, such as proposals, quotes, servicing letters and contracts

S4G's Automated Currency Updater

Testimonial

"It does the job, removes the significant potential hassle of manual updates and doesn't need any maintenance whatsoever. Highly recommended and makes multi-currency orgs a smooth operation."

– *Paul Ginsberg*

Integration

Salesforce and Yahoo Finance

Accessibility

Salesforce

Scope of Use Cases

Currency updater

Risk Manager

Testimonial

"We have been able to gather a much more comprehensive view of our risk and control activities and share this information with risk colleagues and business operations at our numerous international locations. We've been really impressed by the risk assessment functionality, which means we can assess the effectiveness of our controls against our risks."

– *Peter Stapleton*

Integration

Salesforce

Accessibility

Salesforce

Scope of Use Cases

Identify risks, evaluate the likelihood and impact of those risks, mitigate risks, relate them to mitigating controls and actions, track their resolution, report on risk management activities, create and manage approval processes and workflows

Communication DNA

Testimonial

“Our firm uses Communication DNA for both our sales and marketing teams. Personally, I am using the app to segment our customers based on personality for our marketing campaigns. I recommend this app to other financial services firms looking to add new client discovery methods into their marketing and sales processes.” – *Ryan Scott*

Integration

Salesforce

Accessibility

Salesforce

Scope of Use Cases

Client segmentation for real-time customization of marketing, sales and client service activities

Global Currency Updater

Testimonial

“Simple but elegant - just what I needed.”
– *Pav Mahel*

Integration

Salesforce and Yahoo Finance

Accessibility

Salesforce

Scope of Use Cases

Updates currency fields in real-time from Yahoo Finance