

Case study

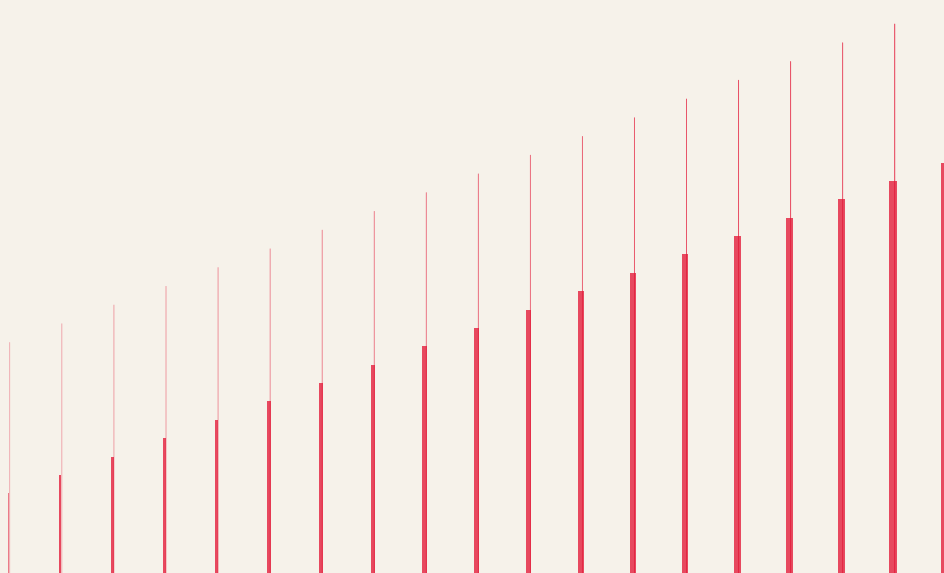
# Leading Commercial Bank Saves 70% Cost by Transforming Global Banking Operations through Salesforce Migration



## Overview

The client, a leading commercial bank operating in over 75 countries, provides comprehensive commercial banking solutions to businesses of all sizes. The bank faced significant challenges due to fragmented CRM systems across various regions. These inconsistencies led to high infrastructure costs, operational challenges, and difficulty maintaining data quality and compliance with regional privacy laws. Tech Mahindra spearheaded a large-scale CRM migration, unifying the bank's diverse systems onto a single Salesforce platform. This transformation streamlined operations enhanced data visibility and ensured regulatory compliance across all regions.

**We partnered with a leading commercial bank operating in over 75 countries to address fragmented CRM systems across regions through a large-scale Salesforce migration**

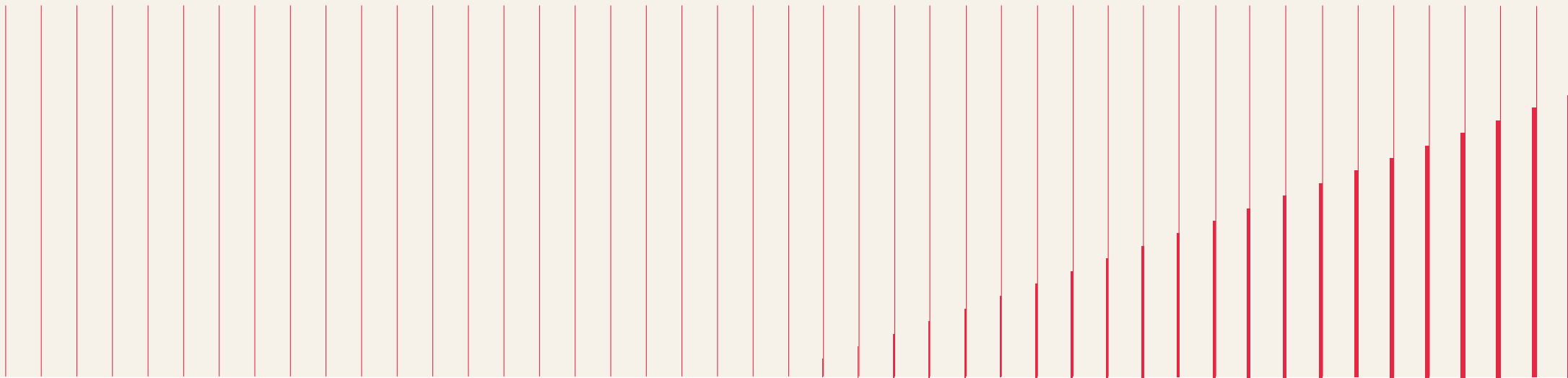




## Client Background and Challenges

The client, a leading commercial bank operating in over 75 countries, provides comprehensive commercial banking solutions to businesses of all sizes. With a vast international presence, the bank serves a diverse customer base, requiring seamless customer relationship management across regions. Given the scale of operations, the client faced significant challenges:

- Managing multiple CRM platforms across regions led to inconsistencies in processes and inefficiencies
- Fragmented systems and redundant support structures resulted in high infrastructure costs.
- Varied regional data privacy regulations caused difficulties in maintaining data quality, visibility, and compliance.



## Our Approach and Solution

We undertook a large-scale CRM transformation to unify the bank's global operations on a single Salesforce platform, ensuring consistency, efficiency, and regulatory compliance across all regions. Our solution focused on:

- **Seamless Data Migration and Integration:**  
Consolidated data from multiple CRM platforms, ensuring a smooth transition to Salesforce with minimal disruption.
- **Enhanced Data Visibility and Compliance:**  
Configured data visibility settings to align with regional privacy laws while maintaining a standardized global framework.
- **Data Cleaning and Standardization:**  
Conducted comprehensive data cleansing and established uniform data models, improving data accuracy and governance.
- **Advanced Global Reporting and Dashboards:**  
Designed unified revenue pipeline reports and dashboards, providing leadership with real-time, region-specific insights.

Additionally, We implemented Salesforce in 75 countries where the bank had no prior CRM system, enabling these regions to become early adopters of the transformation.

## Business and Community Impact

We delivered measurable improvements for the client by standardizing CRM operations on Salesforce:

- **70% Reduction in CRM Infrastructure Costs:**  
Consolidated multiple CRM platforms into a single system significantly reducing server requirements, maintenance expenses, and support costs. The unified platform also eliminated the need for multiple dedicated teams, streamlining IT operations.
- **50% Improvement in Operational Efficiency:**  
Merged regional support teams and automated key workflows reduced personnel needs and enhanced efficiency across all 75 countries. Employees now have seamless access to standardized customer data, improving collaboration and customer service.
- **Enhanced Data Compliance and Governance:**  
Ensured strict adherence to regional data privacy laws while maintaining a unified global framework, mitigating compliance risks.

## About Tech Mahindra

Tech Mahindra (NSE: TECHM) offers technology consulting and digital solutions to global enterprises across industries, enabling transformative scale at unparalleled speed. With 149,000+ professionals across 90+ countries helping 1100+ clients, Tech Mahindra provides a full spectrum of services including consulting, information technology, enterprise applications, business process services, engineering services, network services, customer experience & design, AI & analytics, and cloud & infrastructure services. It is the first Indian company in the world to have been awarded the Sustainable Markets Initiative's Terra Carta Seal, which recognizes global companies that are actively leading the charge to create a climate and nature-positive future. Tech Mahindra is part of the Mahindra Group, founded in 1945, one of the largest and most admired multinational federation of companies. For more information on how TechM can partner with you to meet your Scale at Speed™ imperatives, please visit <https://www.techmahindra.com/>.

\*Figures as per Q3, FY 26.



[www.techmahindra.com](http://www.techmahindra.com)

[www.linkedin.com/company/tech-mahindra](https://www.linkedin.com/company/tech-mahindra)

[www.x.com/Tech\\_Mahindra](https://www.x.com/Tech_Mahindra)

Copyright © Tech Mahindra Ltd 2026. All Rights Reserved.

Disclaimer: Brand names, logos, taglines, service marks, tradenames and trademarks used herein remain the property of their respective owners. Any unauthorized use or distribution of this content is strictly prohibited. The information in this document is provided on "as is" basis and Tech Mahindra Ltd. makes no representations or warranties, express or implied, as to the accuracy, completeness or reliability of the information provided in this document. This document is for general informational purposes only and is not intended to be a substitute for detailed research or professional advice and does not constitute an offer, solicitation, or recommendation to buy or sell any product, service or solution. Tech Mahindra Ltd. shall not be responsible for any loss whatsoever sustained by any person or entity by reason of access to, use of or reliance on, this material. Information in this document is subject to change without notice.