



CUSTOMER SUCCESS STORY

Driving ROI by Replacing Salesforce with Creatio

in Banking:  **Avidia** Bancorp, Inc.



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ABOUT AVIDIA BANK

\$2.81B

ASSETS

241

EMPLOYEES

1869

FOUNDED

9

FULL-SERVICE
BANKING OFFICES



AVIDIA ROLLOUT TIMELINE

Design Phase



- **April:** Design phase kickoff
- **Mid-June:** CRM configuration begins

User Acceptance Testing



- **Mid-September:** First round of UAT
- **Sept. – Nov.:** Feedback reviewed and incorporated
- **Mid-November:** Final round of UAT, teams validated readiness before deployment

Go Live



- **Mid-November:** Payment's deployment
- **Early December:** Salesforce functionality and Commercial deployment
- **Mid-December:** Marketing deployment

ROI DRIVERS

Staffing

Automation

Licensing

Use Cases

Thank you!



Avidia Bank