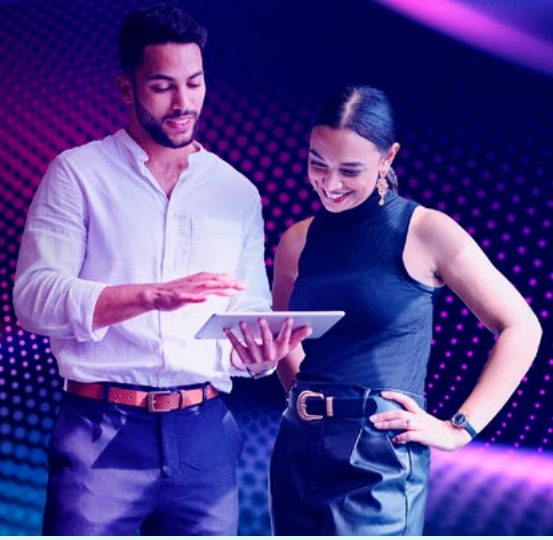




Financial Services and Mutuals

Insights from Salesforce WorldTour 2024



P&N Group are on a transformation journey and nCino, built on the Salesforce platform, is helping them get there.

We were excited to lead a breakout session at the recent Salesforce WorldTour 2024 with expert input from Jacqueline Ryan (Chief Business Bank Officer, P&N Group) and Leslie Standlee (Executive Director, Australia and New Zealand, nCino).

Leveraging P&N Group insights, the session unpacked the benefits and opportunities that an nCino and KPMG collaboration brings to the table.



Tech is escalating at such a pace that you need to call on the broader community.

JACQUELINE RYAN
CHIEF BUSINESS BANK OFFICER, P&N GROUP

What challenges were P&N facing?

With \$7.2 billion in assets and over 640 employees, P&N Group is one of the larger players in the business banking sector – with member-owned P&N Bank as a key pillar.

Focused on the business community within their member base, P&N were looking to build the right infrastructure for growth. They wanted to shift from highly manual processes to fit-for-purpose tools and governance.

Though not at the destination yet, they are focused on learning and growing with experienced partners who understand their needs and can help them uncover the art of the possible.

What is nCino?

nCino is an end-to-end cloud banking platform that connects the bank's core functions and the transaction systems. Organisations can extend Salesforce Financial Services Cloud through nCino to deliver a seamless interaction between employees, customers, business lines and departments.

The platform replaces disparate systems with a single solution that streamlines everything from customer onboarding to account opening.



Replace siloed systems with streamlined experiences



Maximise performance, productivity and profitability



Centralise data for reporting and portfolio management



Accelerate automation

AI IS ON THE ROADMAP FOR nCINO AND P&N GROUP

nCino also has its sights on the potential of generative AI as a way to surface key information like credit policies, so that employees are not having to interpret them every time. This kind of productivity gain would not be possible without supporting data from more than 1,600 customers in the global ecosystem.

For P&N Group, discussion about AI is front and centre at the executive level. Though they're in the early stages of AI adoption, they have made significant progress with mining data and driving data insights. P&N see the next stage as leveraging AI to help inform strategies going forward.



You never take the human out of the decision. You're dealing with customers, their money, their lives – you've got to use AI in a way that enhances that experience.

LESLIE STANDLEE
EXECUTIVE DIRECTOR, AUSTRALIA AND NEW ZEALAND, NCINO

What sets Australian banking apart?



The dedication Australian bankers have towards nurturing customer relationships is a distinctive quality. When Australians choose a bank, it's with the expectation of a lifelong partnership, provided that the trust is maintained, and the service remains impeccable.



By focusing on innovation and meeting the needs of the local market, this trust and brand loyalty can be fostered and maintained.

Work with a certified Salesforce partner

Digital transformation is never a 'point in time' project, it's a partnership that grows and learns along the way.

P&N Group are working with nCino and KPMG to bring a broad perspective to the challenges they face, informing more effective processes and working together towards a common goal.

KPMG brings together specialists in industry, strategy, people and process, technology and data, and cyber and regulation. We work with you every step of the way to see the transformation come to life.

See how we can [unlock a world of possibilities](#) for your organisation.

Talk to our Salesforce specialists today



Zameer Momin
National Salesforce Partner
KPMG Australia

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