

A Top 30 Bank Leverages AutoRABIT to Integrate nCino Into Their Salesforce DevOps Pipeline



Case Study Summary

The client faced challenges applying Agile methodologies to their nCino integration within their extensive Salesforce development practice because of inherent challenges with Salesforce's architectural constraints. These problems grew over the years until they made a concerted effort to update their DevOps toolset and internal practices. The utilization of AutoRABIT ARM, Vault, and CodeScan, and the team's application of Agile philosophies, resulted in optimized deployments, a reduction in technical debt, and streamlined data backups.

Company Overview

The client is a bank and financial services company that has been in operation for over a century. They provide commercial and wealth management services to their clients. They currently work in 8 states, are one of the top 30 banks in the US and have over \$47 billion of assets under management.

The Challenge

Salesforce was designed to be a CRM, not a development platform, which makes it challenging to foster a modern DevSecOps workflow. The client's wide adoption and extensive customization of Salesforce in connection with nCino created a heavy onus on the team to deliver cutting-edge functionality at the speed of business without being able to leverage best practices. Some specific examples of the many challenges the team faced included:



NCINO IMPLEMENTATION

The client began integration with the nCino Bank Operating System in 2019. Aligning their Agile business processes with this technology was difficult.



GROWING TECHNICAL DEBT

After ten years of developing on Salesforce, they had about 650 bugs existing within their system. After Salesforce development accelerated quickly, this grew to about 1,400 bugs over the following two years.



TIMED OUT DEPLOYMENTS

An inability to deploy new changes separate from the entire org led to lengthy deployment times and even running out of GitLab minutes.



TIME-CONSUMING BACKUP PROCESSES

The absence of a native backup tool necessitated a weekly manual download of backup files from Salesforce and created inefficient recovery capabilities. In the event of a data loss, the client was exposed to hundreds of thousands of dollars of potential losses.

AutoRABIT's Solutions

The client implemented AutoRABIT ARM, Vault, and CodeScan to address the gaps in Salesforce's coverage and streamline DevOps processes.



INITIATED CI/CD CAPABILITIES

The client adopted ARM and successfully automated deployments across both their Salesforce metadata practice and their extensive nCino operation enabling the full utilization of Agile methodologies. Collaboration, transparency, and release velocity all spiked, and their defect density has reduced dramatically.



PROVIDED VISIBILITY INTO CODE HEALTH

AutoRABIT provided metrics that made technical debt easier to explain to senior and executive leadership.



AUTOMATED BACKUP AND RECOVERY CAPABILITIES

The client implemented AutoRABIT Vault to insure themselves against manual recoveries and Salesforce data schema re-mapping in the event of data corruption or loss.

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The Results

The client was able to reduce technical debt, increase delivery, and provide more value to their customers through a combination of sourcing intentional DevOps tools and streamlining feedback loops.



INCREASED DELIVERY CAPABILITIES

Over the course of nine months, they were able to increase their issue deliveries by almost 100% by leveraging incremental improvements in technology and internal processes.



ABILITY TO SHIFT QUALITY LEFT

Automated tools and intentional practices have enabled the client to focus on building quality into their teams' processes throughout the release pipeline instead of having to inspect for quality at the end.



INCREASES USER ADOPTION

Through user feedback and analytics, the client's team better understands which parts of their processes should be prioritized for improvement or remediation, and they're starting to apply cutting-edge Agile approaches to the difficult world of Salesforce as their team perfects its Salesforce release processes.