

# Lucro Offers Increased Value to Clients with AutoRABIT ARM + CodeScan

## CASE STUDY SUMMARY

Many financial institutions are pursuing digital transformation, but lack the necessary tools to do so in a safe and secure way. Lucro leverages AutoRABIT ARM and CodeScan to help these institutions innovate on the Salesforce platform while remaining secure and compliant. Through leveraging AutoRABIT, Lucro's clients have experienced streamlined implementations, stronger data security, and a better experience with nCino.

## COMPANY OVERVIEW

Lucro is a boutique Salesforce and nCino consulting firm dedicated to helping financial institutions unlock the full potential of the Salesforce platform. Started by a former banker and former nCino Technical Director, Lucro blends functional and technical best practices to get the most out of their clients' digital journeys. They work with clients to advise on product roadmaps, optimize their existing platforms, and implement new Salesforce and nCino products.

## THE CHALLENGE

“Whenever we want to solve a problem, it’s grounded in the business problems, not the solutions.”

-Josh Rodriguez, Lucro Co-Founder

Lucro's clients encountered a series of difficulties setting up and managing their nCino deployments, leading to wasted time, error-prone processes, and potential security vulnerabilities.

### COMPLICATED MIGRATIONS

nCino's record-based configurations are complex combinations of numerous objects tied together, encompassing hundreds of records. Without a tool like AutoRABIT, a multi-step process is needed to export and upload this data.

### CLUNKY MANUAL PROCESSES

Deployments resulting in errors needed to be restarted from the beginning, leading to long implementation times and wasted hours.

### INSUFFICIENT ERROR MESSAGING

A lack of clarity when problems occurred led to frustrating and time-consuming processes to figure out what went wrong.

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## AUTORABIT'S SOLUTIONS

“Not only can we deliver with higher quality [with AutoRABIT], but our clients benefit from quicker projects that put an emphasis on design rather than the build.”

-Josh Rodriguez, Lucro Co-Founder

Lucro utilizes AutoRABIT ARM, CodeScan, and the nCino Add-On to deliver higher quality projects faster.



### CUSTOM AND STANDARDIZED TEMPLATES

AutoRABIT worked alongside nCino to create 49 standardized templates—and custom templates as well—to streamline the deployment and implementation process.



### AUTOMATED SCANS OF CODE

AutoRABIT CodeScan enabled Lucro to analyze client environments and provide an up-to-date baseline of where they stand with technical debt.



### UNIFIED, AUTOMATED APPROACH

By combining the power of AutoRABIT ARM and CodeScan, Lucro was able to expedite processes, reduce manual touchpoints, and increase the reliability of results.



### CONTINUOUS UPDATES

AutoRABIT's partnership with nCino continues to drive value with updated services and templates that directly address the needs of clients like Lucro.

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## THE RESULTS

“Leverage a tool like AutoRABIT to extend outside of DevOps and help your QA teams speed up processes.”

-Josh Rodriguez, Lucro Co-Founder

AutoRABIT expedites many processes through strategic automation to enhance the value Lucro provides to clients.



### EMPOWERING INSTITUTIONS

By utilizing AutoRABIT tools, Lucro gives their clients the ability to leverage the processes of verifying and configuring deployments internally.



### ABILITY TO QUICKLY SPIN UP DEV ORGS

Lucro uses seed test data and other available records to create new orgs on the fly, which promotes creative development and helps new team members get up to speed quickly.



### EASILY DEMO QUICK STARTS

Lucro provides a series of Quick Start offerings to help clients reduce implementation costs and time to market.



### QUICKLY DISPLAYING OPTIONS FOR CLIENTS

Lucro offers various recipes for nCino features with different metadata and record-based configurations. AutoRABIT enables Lucro to quickly produce examples of the different ways to configure nCino features so clients can evaluate what works best for their business.