

salesforce

Driving Transformation: Financial Services



Industry Overview

FINANCIAL SERVICES

Today's FinTech industry leaders need to adapt or risk losing established client networks to industry disruptors.

- 75% of policyholders would switch insurers to get more personalized service.¹
- 73% of millennials indicate they would be more excited about a new financial-services product from Google, Amazon, Apple, PayPal, or Square than from their current banks.²

- 67% of investors cite modern tools for financial planning as a key factor for choosing a financial advisor.³

Today's customers want effortless, efficient, and highly personalized interactions whenever and wherever they choose to engage and the knowledge that their data is protected and secure.

Successful firms use CRM solutions to address these realities and put customers at the center of the business model with:

- **Connected Operations:**
Make it easier to deploy marketing, sales, and service solutions across the organization with a single platform that leverages digital innovations, improves the customer experience, and helps you stay competitive.

- **Connected Customers:**
Enhance loyalty, create seamless customer experiences with digital engagements that extend high-touch interactions to the web or a mobile device, and empower customers to access their own data on demand.

- **Connected Channels:**
Connect disparate databases to increase productivity and improve service with a 360-degree view of each customer that includes current accounts, financial life goals, household relationships, centers of influence, and more.

1: Salesforce Insurance eBook
2: The Millennial Disruption Index
3: Salesforce Connected Investor Report

“Salesforce helps us be a relationship bank.”

– **Steve Ellis**, EVP, Wells Fargo



Industry Overview

FINANCIAL SERVICES

A digital transformation connects you to customers in whole new ways.

Every sector can use artificial intelligence to uncover client insights and to predict, recommend, and automate core processes. Here are some specific benefits for each sector:

- **Banking:** Engage customers with insightful, personalized journeys. Retail bankers create a digital interaction that matches the in-person banking experience and gain visibility into premier customers' household relationships, extended networks, and financial goals. Mortgage bankers simplify processes with all data in one place accessible from any place. Business bankers gain deeper insights into clients' needs and streamline loan origination and process workflows.
- **Insurance:** Improve the customer experience and policyholder retention by making customer satisfaction the focus of every interaction. Use cloud-based, mobile-enabled technology to streamline service requests, track new opportunities, and prioritize inquiries based on urgency. Provide more meaningful experiences with smart alert reminders of important life events, real-time interactions from any device, and self-service capabilities for tracking claims.
- **Wealth Management:** Supercharge advisors' productivity and ability to focus on client needs. Stay in touch with personalized interactions based on goals and pivotal life events, respond to timely account alerts, and collaborate across the household – via any device. Automate routine processes with customizable actions, and deploy client referral tracking so you never miss an opportunity to connect.
- **Capital Markets:** Increase collaboration and communication in a secure cloud-based environment. Streamline client engagement by predicting needs and delivering insights on any channel at any time.

Innovation is the key to competing with FinTech disruptors, and the pace must be rapid. Investigate the following solutions to accelerate your ability to deliver personalized advice at scale that empowers your customers to improve their financial lives.

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2

16

100%

2019

THE POWER OF FULLFORCE

How do you drive transformation?

The key is innovation
at a rapid pace.

Enter Fullforce, a suite of cloud-based solutions developed by industry experts at leading system integrators and based on the proven Salesforce Customer Success Platform. These solutions have the full power and support – the full force – of leading systems integrators and Salesforce, the world’s most innovative company.

We partner with leading consulting firms that use Salesforce technology to build innovative solutions tailored to industry-specific business requirements. The products are designed to solve your unique challenges and decrease time-to-value, so you quickly reap tangible business benefits.

The more than 60 solutions in the Fullforce portfolio are built on proven deployments with leading organizations across businesses and industries. Fullforce empowers you to win in the customer economy with:

- **Industry-Leading Best Practices.**

Because we partner with the top advisors, you can be confident that you’re getting the latest solutions that have been tested and tailored to your sector and business.

- **Quicker and Easier Time to Deployment.**

Fullforce solutions use the cloud to deliver business benefit without a significant infrastructure investment. Whether you take an incremental or transformational approach, Fullforce solutions accelerate deployment, support iteration, and reduce time-to-value.

- **Better Traction on KPIs.**

Once deployed, Fullforce solutions give you the power to launch, manage, and repeat or retool activities that drive sales, service, marketing, and community engagement.

We’ve pulled together the most powerful Fullforce solutions created by our strategic system integrators in your industry. Use this ebook to find the right Fullforce solution to drive customer success and expand your business.



Solution Overview

ACCENTURE BANKING PLAYBOOK SOLUTION

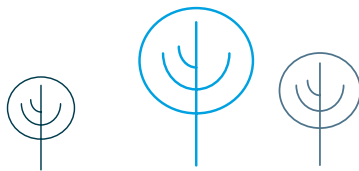


The Accenture Banking Playbook solution accelerates time to market with a suite of CRM best practices that adds value by simplifying the banking experience for your customers and your employees

THE SOLUTION:

- Leverages Accenture's in-depth knowledge and experience in the industry with Salesforce's customer success platform
- Is tailor-made to address the unique challenges of the banking industry
- Blends cloud, social and mobile technologies

The Playbook helps your bank increase revenue and close deals faster by taking a more personalized service approach and delivering a more tailored customer experience.



BENEFITS

The solution creates efficiencies in three key areas of interest:

- **Better Loan Origination.** Make the typically arduous loan application and approval process easier for customers. Move your paper-based system to a more streamlined online loan origination process that takes less time to complete and reduces human data-entry errors and duplication of effort.
- **Easier Leads and Referrals.** Create a single, 360-degree view of customers across every channel and touchpoint so it's easier to nurture and convert leads, regardless of channel or product. Share data across all lines of business with new digital tools that enable your team to deliver the seamless experience needed to improve customer satisfaction and loyalty – and boost revenue.
- **Increased Account Activity.** Make it quick and easy for your customers to engage in a number of different activities across multiple channels. Meet customers' growing demand for banking services when and where they want them with mobile-, cloud-enabled systems. Streamline how customers interact with their accounts.

80% of bankers agree that organizations will need to understand not just where people are today, but where they want to be, and then shape the technology to act as their guide.

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Solution Overview

ACCENTURE INSURANCE AGENT EFFECTIVENESS



The Accenture Insurance Agent Effectiveness solution creates an ongoing cycle of improvement with increased visibility and access to data.

THE SOLUTION:

- Is tailored to the special needs of carriers and agents
- Combines Accenture's industry experience with the award-winning Salesforce platform
- Enables you to easily and cost-effectively address industry challenges

The Accenture Insurance Agent Effectiveness solution empowers you to improve your entire team's effectiveness and efficiency through execution consistency and territory planning.



BENEFITS

The Accenture Insurance Agent Effectiveness solution improves functionality and enhances account planning and relationship management through:

- **Functionality.** Enhance business agility and flexibility with automated and standard processes for planning, recruiting, onboarding, training and development, sales execution, and ongoing performance management. Create an agent/agency profile to understand the strengths and weaknesses of your agency and to establish a basis for tracking ongoing sales progress.
- **Account Planning & Relationship Management.** The solution improves performance and depth of producer relationships. Encourage loyalty through better service with top-down, bottom-up sales-planning tools and growth-planning calculators. Develop and capture overall sales goals and targets by product lines, and generate a regular schedule for visits that develops relationships and drives results. The solution also increases speed-to-performance for new agents and brokers and makes it easier to recruit and appoint high-performing agencies, agents, and brokers.
- **Time & Cost.** The Accenture Insurance Agent Effectiveness solution requires less time and cost to deploy. It's easy to scale and is quickly updated, so you experience rapid business outcomes with relatively low IT support and spend.

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Solution Overview

ACCENTURE INSURANCE PRODUCER DIRECT



Your business depends on an effective producer channel. But limited access and information-sharing between you and your agents impair your ability to understand the sales pipeline and data. Insurance Producer Direct addresses these challenges directly.

THE SOLUTION:

- Is designed specifically to help insurers get more from the producer channel
- Combines Salesforce's robust technology platform with Accenture's broad industry experience
- Provides benefits from marketing automation, and cloud-based, mobile- and social-enabled technology

Insurance Producer Direct is based on best practices and populated with pre-configurations and valuable technical components, such as agent/producer retail management and marketing automation.

BENEFITS

Insurance Producer Direct empowers your producer sales organization to sell more through:

- **Productivity.** Provide agents with vital tools, such as needs analysis/calculators, a tool to identify upsell opportunities, and a hub to access product and customer data from any location on any device. Social capabilities make it easy to find leads and enable social selling.
- **Effectiveness.** Support producers with smart lists focused on key deal-closing activities or showing leads with rankings, notes, and first-touchpoint details. Chatter and communities encourage real-time collaboration and appointment tracking.
- **Recruitment & Onboarding.** Make the process of finding and preparing agents more efficient with access to a trusted network for agent referrals. Personalize agent access to your intellectual capital so they have the information they need to succeed.

Insurance Producer Direct was created by Cloud Sherpas, which is now part of Accenture.



42% of insurers say difficulty sharing customer data and analytics keeps them from realizing optimal agent productivity.

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Solution Overview

eContact Center FROM ACCENTURE



Effective and high-quality customer service is no longer a “nice to have.” eContact Center enables you to design more meaningful service-touchpoint interactions that affect the bottom line.

THE SOLUTION:

- Is designed expressly to meet the complex needs of the insurance industry
- Balances Accenture’s insurance-industry knowledge with Salesforce’s technology
- Promotes collaboration and efficiency with a cloud-based, mobile- and social-enabled product line

eContact Center replaces the traditional call center with a digital one focused on customers, their agents, and beneficiaries.

BENEFITS

Increase customer care with eContact Center through:

- **Enhanced Customer Service.** Achieve customer centricity with easy data harvesting, efficient responses, and personalized experiences. A 360-degree view of the customer empowers agents to provide more information and reduces repeat calls and customer dissatisfaction. Self-service portals enable instant online or mobile access to data.
- **Cost-Effectiveness & Agility.** Based in the cloud, eContact Center is regularly and automatically updated. The Agile methodology ensures that features and capabilities are rapidly iterated and integrated, enabling you to keep up with changing technologies, scale, and needs.
- **Enhanced Efficiency.** Improve agents’ productivity with predictive modeling, sensitivity tractions, integrated holistic desktops, knowledge management, and dynamic collaboration. The solution also eliminates manual processes and lookups, and it encourages collaboration between sales, underwriting, claims, and other departments.

eContact Center was created by Cloud Sherpas, which is now part of Accenture.

Insurers using a service-agent dashboard with a 360-degree view of the client experienced a 31% increase in customer retention and a 34% increase in first-call resolution.

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Solution Overview

INVESTMENT MANAGEMENT FROM ACCENTURE



Investment Management is a true vertical solution that sets a foundation for a business benefit-driven approach to cloud technology – reducing time to deployment with industry best practices and a proven methodology.

THE SOLUTION:

- Is built especially for investment-management firms
- Combines Accenture's experience in financial services and investment management with Salesforce's industry-leading cloud technologies
- Enables mobile, social, and digital capabilities without substantial IT infrastructure investment

We take a comprehensive approach to assessment through design, integration, deployment, and ongoing support.

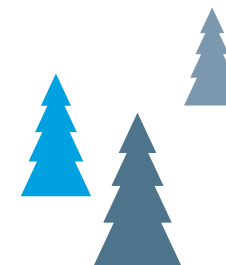
BENEFITS

Investment Management addresses operational, technological, and customer-service challenges, so you gain and maintain a competitive advantage through:

- **Operational Efficiencies.** Automate and streamline core retail and institutional investment-management functions, including sales roll-up reporting, call reporting, event tracking, expense tracking by client, campaign management, and literature fulfillment. Some elements are populated with pre-configurations and value-added technical components.

- **Technology Advantage.** Investment-management frameworks accelerate Salesforce implementation and deployment, and Accenture's advisory services, which provide for strategic direction, change management, integration, and user adoption. Mobile functionality and social-collaboration workflow scale across the organization without requiring a major investment in infrastructure.
- **Customer Service.** Power more robust client profiling and investor preferences, integrating digital and CRM strategies to elevate brands. It includes a mobile solution for your field sales team, and a central data hub equips your marketing team to target advisor and broker-dealer business more efficiently. It also promotes targeted social solutions to help intermediaries add more value for potential and existing clients.

Investment Management was created by Cloud Sherpas, which is now part of Accenture.



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Solution Overview

CAPGEMINI ALL CHANNEL EXPERIENCE



Capgemini All Channel Experience (ACE) increases revenue and retention, enabling you to engage customers cost-effectively at every interaction along the quote and buy, service, and claims journeys. Offering a more intimate level of customer service establishes a future-proof competitive edge for your firm.

THE SOLUTION:

- Is designed specifically for the insurance industry
- Combines Capgemini's extensive industry know-how with Salesforce's award-winning technology
- Enables digital transformation with cloud-based and mobile- and social-enabled solutions

ACE strengthens every customer communication channel to create more value through superior service.

BENEFITS

With Capgemini's ACE, customer-experience effectiveness is increased, agent productivity grows, and your IT capabilities are more robust through:

- **Richer Relationships.** Offer customers a more responsive and personalized experience, differentiating your agency and increasing business. And you ensure that a customer has the same experience across multiple channels and on any device.
- **Agent Productivity.** Cloud access to real-time product knowledge and integrated telephony make agents more efficient. ACE's unified view of the customer enables agents to review interactions and transactions more quickly so they can upsell, cross-sell, and write more business. And the experience is enhanced, so leakage is reduced.
- **Digital Transformation.** Integrates the Salesforce1 platform with insurance binding and underwriting systems such as Guidewire and e-signature providers such as DocuSign. Implementation is unique to your needs, and deployment is fast, reducing time-to-value dramatically.

Globally, positive customer experiences decreased significantly in 2014, indicating that steps taken by insurers are not matching rising customer expectations.

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Solution Overview

DELOITTE DIGITAL ADVISORCONNECT



Today's insurance customers expect more from providers, including personalized and direct communication and a higher level of customer service. AdvisorConnect positions you to address these challenges.

THE SOLUTION:

- Is pre-configured, integrating mobile, cloud, social, and analytics technologies
- Blends years of Deloitte Digital insurance-industry experience with the Salesforce Customer Success Platform
- Streamlines the processes you use the most to provide personalized, faster customer service

With AdvisorConnect, you can improve revenue and indemnity spend, upgrade underwriting performance and operational efficiency, and provide superior customer service.

BENEFITS

Deloitte Digital AdvisorConnect provides faster time-to-value through:

- **Integration.** Gather customer data, create quotes, and secure underwriting approval more quickly with auto-fill quote sheets and forms. This decreases the time required to complete tasks related to new business development, application submission, underwriting, and policy issuing. Collaboration tools and communities allow you to work more effectively with partners and employees.
- **Omni-Channel Experience.** Drive customer satisfaction with mobile- and social-enabled access to self-service portals and apps. Loyalty management, combined with social media monitoring, increases the effectiveness of marketing and promotions. The online assistance and search tools help you be more responsive.
- **Distribution.** The end-to-end sales process leverages automation to improve lead, opportunity, and contract management; it also increases productivity with 360-degree dashboards and geoplanning tools and reports.

Customers using AdvisorConnect saved 200 days in the implementation and 120 days in distribution.

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Solution Overview

DELOITTE DIGITAL BANK



Deloitte Digital Bank provides accelerators to engage, advise, onboard, and service clients across all lines of business. Built on Salesforce's technology, Deloitte Digital Bank can increase revenue and retention and improve efficiency throughout the enterprise.

THE SOLUTION:

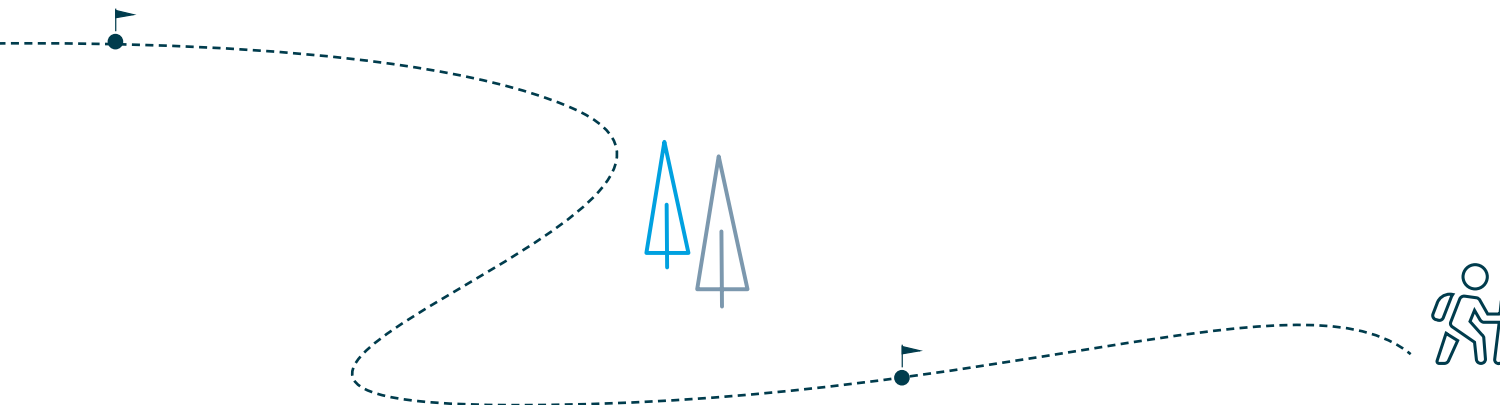
- Combines Deloitte Digital's extensive knowledge of the financial industry with Salesforce's demonstrated technologies
- Focuses directly on the key pain points financial companies experience
- Includes pre-built features for banking, wealth-insurance, and asset-management processes

Deloitte Digital Bank improves operations, refocuses channels, and meets customers' needs without having to rip and replace the existing technology infrastructure.

BENEFITS

Deloitte Digital Bank can help you improve productivity and collaboration, provide better service, and integrate and customize solutions to drive:

- **Productivity & Collaboration.** Track goals, map relationships, and address compliance and regulatory requirements with pre-built features that make data actionable with dashboards and reports. You can even integrate with social media to automatically capture leads and create cases.
- **Service.** Be more responsive to customer needs with mobile devices that untether specialists and managers from their desks so they can work with clients more closely.
- **Integration & Customization.** The solution is easy to customize and deploy. It's designed to implement with core banking systems using a simplified programming model in a cloud-based, run-time environment. It can be built and run up to five times faster and at about half the cost of traditional software platforms.



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Solution Overview

LIQUIDHUB ADVISORFOCUS



The AdvisorFocus solution provides faster and more predictable deployments so you can manage your client relationships and improve advisor productivity.

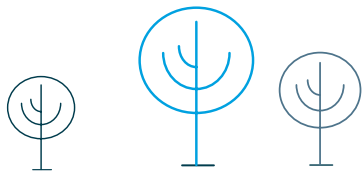
THE SOLUTION:

- Is created to address the unique requirements of wealth advisors
- Leverages LiquidHub's deep vertical expertise to provide more personalized customer experiences using the proven Salesforce platform
- Captures the power and convenience of the cloud and mobile- and social-enabled technology

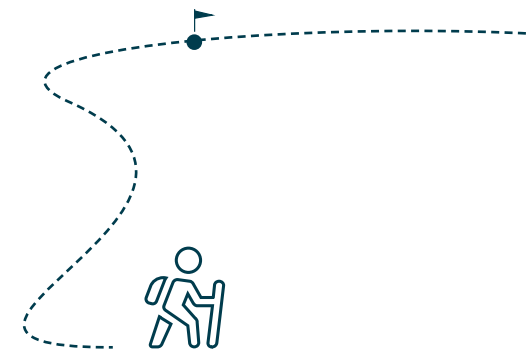
BENEFITS

AdvisorFocus enables you to rapidly deliver tools to manage client relationships and improve advisor productivity through:

- **Integration Support.** Minimize custom work and accelerate delivery.
- **Accelerated Discovery & Build Cycles.** Provide end-to-end solutions with a truly seamless implementation process since the bulk of the configuration is in place.
- **Defined Wealth-Management Best Practices.** Implemented quickly, so firms can focus their efforts on building value-added features unique to their business.



Firms using the Financial Services Cloud, when correctly customized and integrated, can better collaborate internally with sharable, accurate information.



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The LiquidHub Asset Management solution supports sales, client service, and marketing for both institutional sales and intermediary wholesaling.

THE SOLUTION:

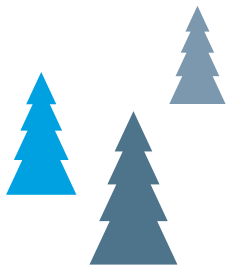
- Integrates industry best practices, years of industry expertise specific to asset management, the Salesforce platform, and Salesforce1 Mobile App
- Supports integration with most commonly used third-party systems in the industry (portfolio management, sales data, Microsoft Outlook, etc.)
- Offers a full suite of CRM transformation services – architecture design, implementation, data integration, QA, training, and support – and a large degree of flexibility that can be molded to suit each firm's unique structures and business processes

BENEFITS

LiquidHub Asset Management helps institutional and intermediary sales, client service, and marketing be more effective by:

- **Minimizing.** Minimize custom work and accelerate delivery.
- **Providing.** Provide end-to-end solutions with a truly seamless implementation process since the bulk of the configuration is in place.
- **Implementing.** Implemented quickly, so firms can focus their efforts on building value-added features unique to their business.

The LiquidHub Asset Management solution is intended to be used as a starting point for firms that wish to further customize the CRM solution to suit their specific needs. The pre-built features included in the solution are focused on three key areas: relationship management; sales support; and data, measurement and analytics.



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Solution Overview

MAGNET 360 AGENT CONNECT



Magnet 360 Agent Connect is the key to keeping up with digitization and changing customer requirements. It's easier to capitalize on industry trends and address core challenges so you can differentiate, streamline, and expand your business.

THE SOLUTION:

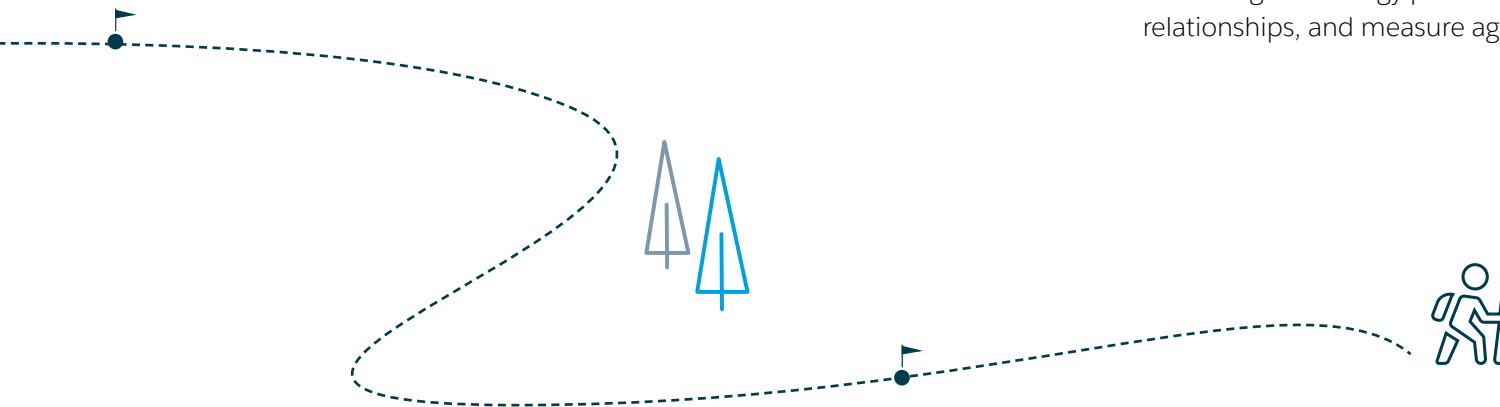
- Is built to meet insurance companies' distinct needs
- Combines Magnet 360's experience in the financial-services industry with Salesforce's deep multicloud capabilities
- Provides Salesforce Marketing Cloud resources

Agent Connect enables "engagement for outcomes" to drive measurable results for your business.

BENEFITS

Agent Connect creates value in agent productivity, improved marketing, and more accurate journey definition through:

- **Agent Productivity.** Reduce time spent looking for information with a 360-degree view of customers and independent agents, so there's more time for selling. Hierarchy, performance, and opportunity tracking save additional time.
- **More Data.** Performance dashboard and reports create a data foundation for marketing automation and better collaboration between sales and marketing. Increase your use of one-to-one multi-channel marketing (email, web, social) to target customers and increase sales. Outreach is focused on activation and conversion through nurture campaigns, optimized content, and lead scoring and grading.
- **Journey Definition.** Map the agent hierarchy and journey to existing technology platforms to view interactions, nurture relationships, and measure agent acquisition and retention.



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Solution Overview

PWC WEALTH MANAGEMENT



The PwC Wealth Management solution combines PwC's robust industry knowledge with Salesforce's proven cloud-based and mobile tools. It adds value to your business by identifying new ways to compete, improving your knowledge of client relationships, maximizing the most profitable customer relationships – and doing it all without a significant spend on improvements to your existing infrastructure.

THE SOLUTION:

- Is designed specifically for the wealth-management industry
- Leverages cloud technology to produce efficiencies and improve service
- Enables collaboration to increase competitive advantage

PwC Wealth Management increases your ability to deliver high-value services to your most valuable customers, powered by a highly efficient back-end.

BENEFITS

With PwC Wealth Management, you're well positioned to reduce costs, increase staff productivity, and gain crucial market share through improved client satisfaction:

- **Reduce Costs.** Use the cost-effective cloud to reduce your reliance on the IT stack, so upgrades and maintenance are centrally managed, rapidly deployed, and less expensive.
- **Productivity.** Customizable tools facilitate collaboration and increase transparency, giving the entire team a 360-degree client view. You can also set goals, track progress, review your book of business, and monitor the pipeline. Mobile integration lets you work from your tablet or smartphone.
- **Satisfaction.** The unified client view enables you to anticipate and address opportunities and issues, increasing your value to the customer. Create, deliver, and track client communications, such as subscriptions, invitations, special occasions, etc., from one central location.



Only slightly more than half (51%)
of intergenerational clients remain with
their family's original wealth advisor.

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Solution Overview

SILVERLINE BANKER360



Silverline's Banker360 changes the way you interact with customers by aggregating data from multiple systems into a single 360-degree view of the customer relationship. You gain a competitive advantage through cutting-edge technology that removes inefficiencies from typical sales, service, and operational activities and drives action through analytics.

THE SOLUTION:

- Is designed to address the specific needs of banks and financial-services companies
- Empowers collaboration and cost efficiencies with a cloud-based mobile- and social-enabled solution
- Blends Silverline's deep industry experience with the Salesforce Customer Success Platform

Silverline works with banks to review current sales-management practices and operational processes and provide feedback based on industry best practices that accelerate time-to-market.

BENEFITS

Banker360 enables you to be more competitive and responsive, creating a faster time to market with:

- **Streamlined Onboarding.** Equip employees with a single view and understanding of each customer's and household's information, and when to engage. Banker360 also integrates to core systems, providing increased visibility and effectiveness.
- **Sales Insights.** The solution enables more effective sales management and performance with lead, opportunity life cycle, and pipeline management; customer tiering and outreach workflow; and insights into next best offer and propensity to buy.
- **Referral Management.** Effectively manage internal and external referrals while identifying opportunities for cross-selling and referrals to other groups beyond retail banking.



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Solution Overview

SILVERLINE WEALTH MANAGEMENT



Silverline's robust Wealth Management solution manages client relationships while integrating with portfolio-management and financial-planning applications, allowing advisors or relationship managers to have a 360-degree view into their book of business through a single pane of glass.

THE SOLUTION:

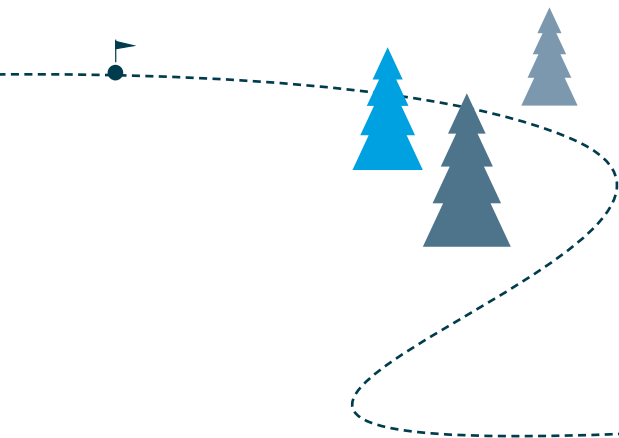
- Is custom-built for wealth-management relationship managers
- Leverages Silverline's extensive experience in the industry with Salesforce's recognized cloud-based technologies
- Creates a technology environment that's more agile and effective without a total redesign

Investing in this solution improves your firm's productivity and retention, enabling you to meet key goals for growth.

BENEFITS

The cloud-based tech layer of Silverline's financial-services solution delivers high levels of service necessary to secure retention and drive new revenue opportunities through:

- **Seamless Integration.** The solution is customizable to your unique business processes and external applications. Eliminate inefficiencies across the firm with autogenerated client emails and other processes. It uses social and mobile capabilities to encourage real-time collaboration for better workflows.
- **Client Retention.** Consolidate all your client information into a single, organized data source, including notes, documents, and activities. This gives employees the power to deliver a high-touch experience informed by personal and contextual knowledge. Create tailored client proposals and reports faster to provide more value to existing and prospective clientele.
- **New Revenue Opportunities.** Use the process efficiencies and automated marketing and communication tools to identify new high-value clients and produce high-quality sales materials that get results.



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Solution Overview

WEST MONROE PARTNERS BANKING CXellence



Banking CXellence helps banks and credit unions improve customer experience and increase share of wallet with pre-built accelerators and a universal data model that supports sales and service for all lines of business on a single platform.

THE SOLUTION:

- Harnesses the power of mobile, cloud, and social technology to improve productivity
- Blends West Monroe's deep financial industry experience with Salesforce's leading solutions
- Is purpose-built to address the specific needs of financial institutions

After implementation, banks and credit unions can experience revenue lift, plus decreases in handling time and increases in client retention and satisfaction scores, cross-selling, and referrals.

Our bank has seen drastic improvements in call handle time and referrals just to name a couple areas on the operational side, and we also have been able to create a more consistently remarkable experience for our clients. We are well positioned to see many additional benefits in the short-term.

BENEFITS

Our solution accelerates the pace to implement Salesforce while aligning to best practices with:

- **Unified Data Views:** Support all lines of business with a universal data model that supports common processes and reporting capabilities. Break down the silos between various lines of business to streamline operations and increase productivity.
- **Improved Access:** Enable access to key customer financial data at both the client and household level via our solution's seamless integration with your core banking systems. Diversify or increase income by cross-selling products and services to other business lines to generate more fee-based income.
- **Accelerated Sales and Service:** Provide faster speed of service and a more personalized and effortless client experience. Pre-build modules for automated referral and service request management, household income, lead conversion, enterprise pipeline transparency, and complex loan structures

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CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY

