



SALESFORCE FINANCIAL SERVICES CLOUD

THREE CORE ADVANTAGES



Introduction

In the next five years, more than \$2 trillion is expected to transfer between generations.^[1] To capitalize on this massive redistribution of wealth, today's financial advisors need to meet the demands of today's clients who are social, mobile, more connected, better informed and looking to collaborate with their advisors when they want, where they want. In fact, according to the Salesforce Connected Investor report, 55% of investors want to work more closely with their advisors. To succeed, advisors must have relationships with their clients that are deeper than just the numbers, and focus on individuals and their unique needs.

¹Accenture, "The 'Greater' Wealth Transfer Report," June 2012

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Regulatory and competitive pressures, combined with clients' changing expectations, are forcing wealth managers to invest heavily in innovation. As profit margins shrink, advisors need to become even more creative in providing better client engagement. And investors are demanding it as well. More than 50% of customers say their advisors don't have the technology to meet their needs.^[2]

To address these challenges, Salesforce is excited to introduce its first industry-wide product, Salesforce Financial Services Cloud. Initially focused on Wealth Management, we are adopting the core customer relationship management principles and best practices that have made us the global leader and applying our knowledge to tackle the unique challenges of financial services. This e-book will explore the three main advantages of Salesforce Financial Services Cloud and show advisors how they can differentiate themselves by building and managing client relationships like never before.

² PwC Rebooting Wealth Management, 2015



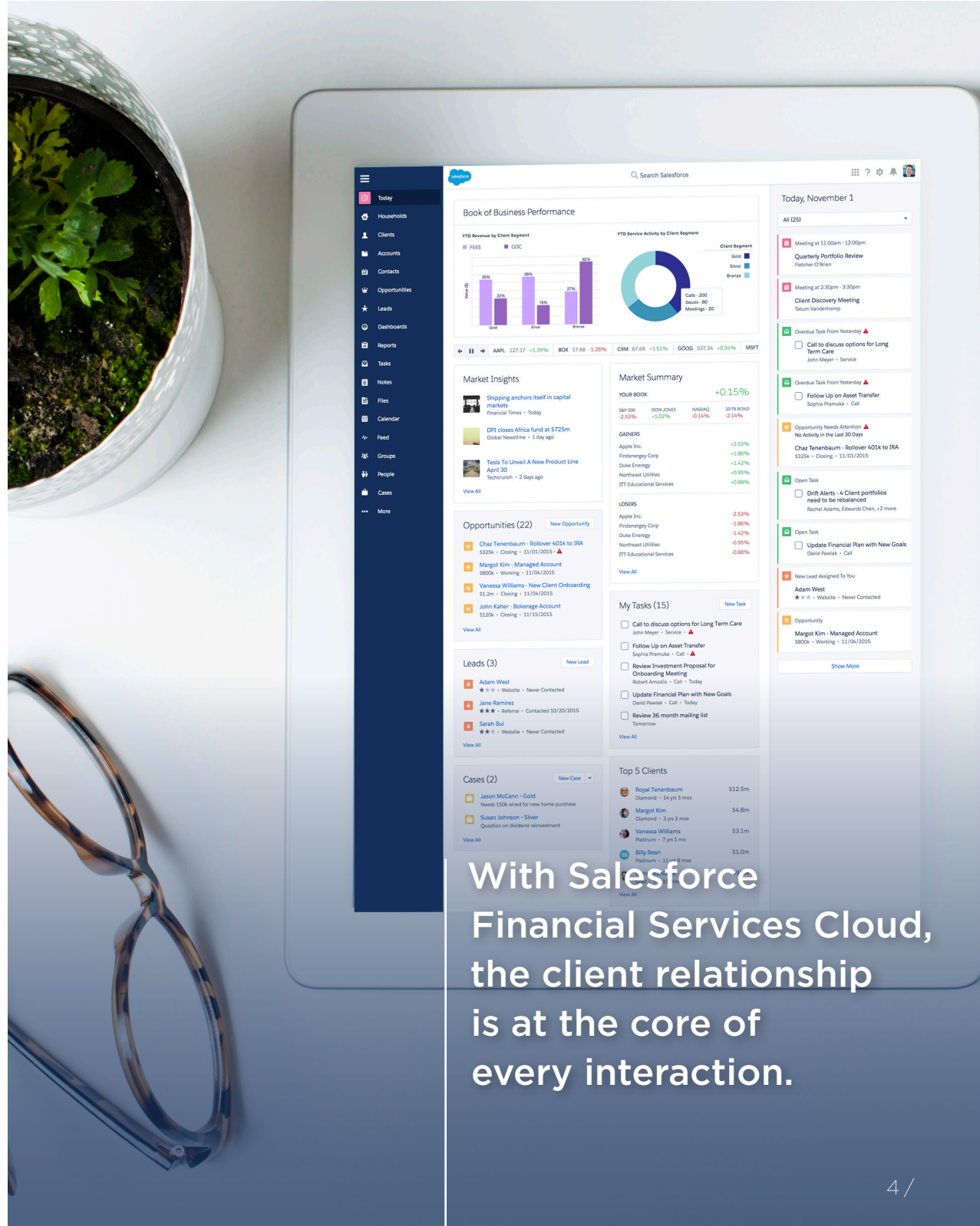
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Chapter 1

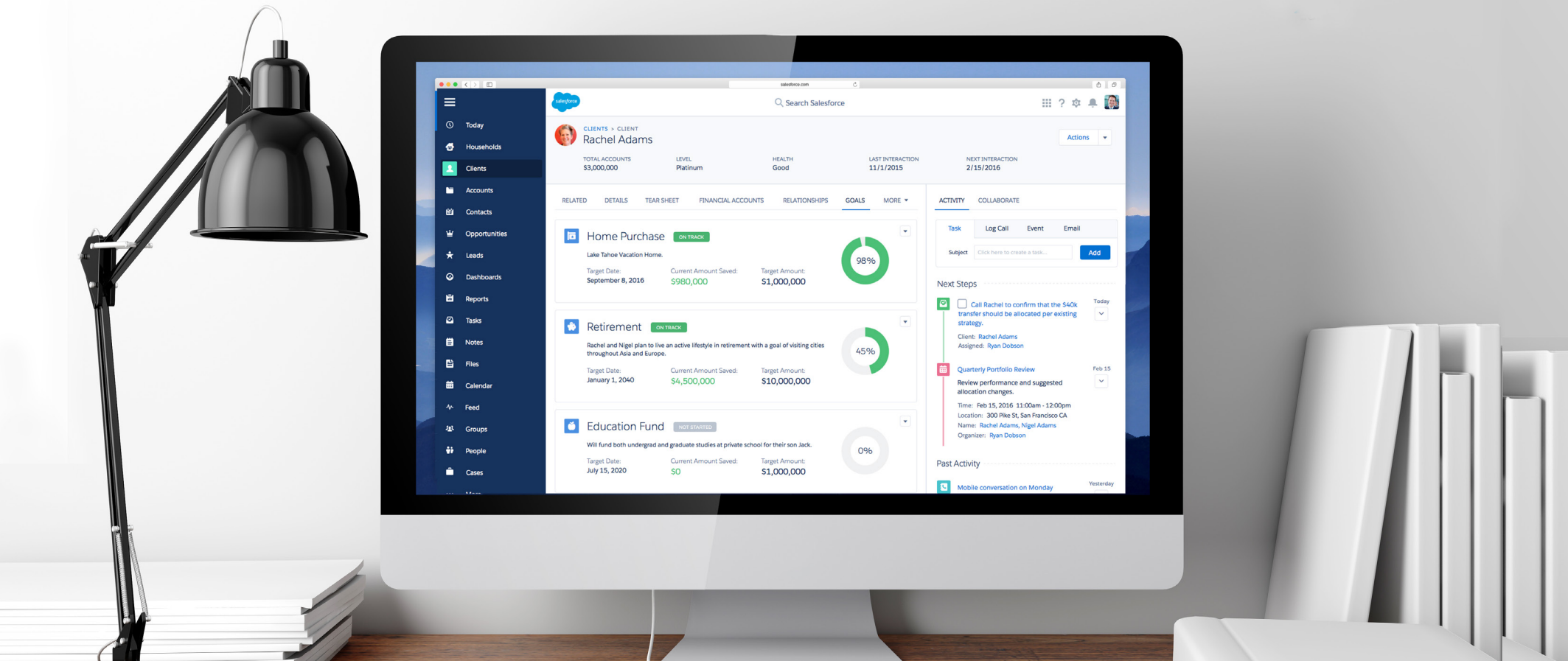
1-TO-1 CLIENT RELATIONSHIPS

Advisors and their teams are often disconnected from clients' experiences and lack the appropriate technology to offer superior service, which clients have come to expect from all interactions. Many financial advisors complain that there are too many manual processes, that they spend too much time aggregating information, and that administrative and compliance tasks fill their days. Using better digital solutions and automation can help lower fees paid by investors and offer them a higher level of engagement in the management of their wealth.

With Salesforce Financial Services Cloud, the client relationship is at the core of every interaction, with proactive information pushed to the advisor that accelerates productivity. This starts with having the right information for each client and going beyond the surface to understand each individual's needs, goals and family relationships.



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We do this by developing rich, contextual client profiles that go beyond the standard form, allowing advisors and their teams to capture and access all of this rich information that extends beyond CRM, to other critical systems, creating a unified view of information to make the advisors as productive as possible. In addition, you can create additional profiles within a single client page to start mapping household relationships. Influence in families is mixed, and it's critical to understand the relationships to build trust with current and future generations of clients.

And the best way to build trust is to truly understand each client's goals. Salesforce Financial Services Cloud helps start

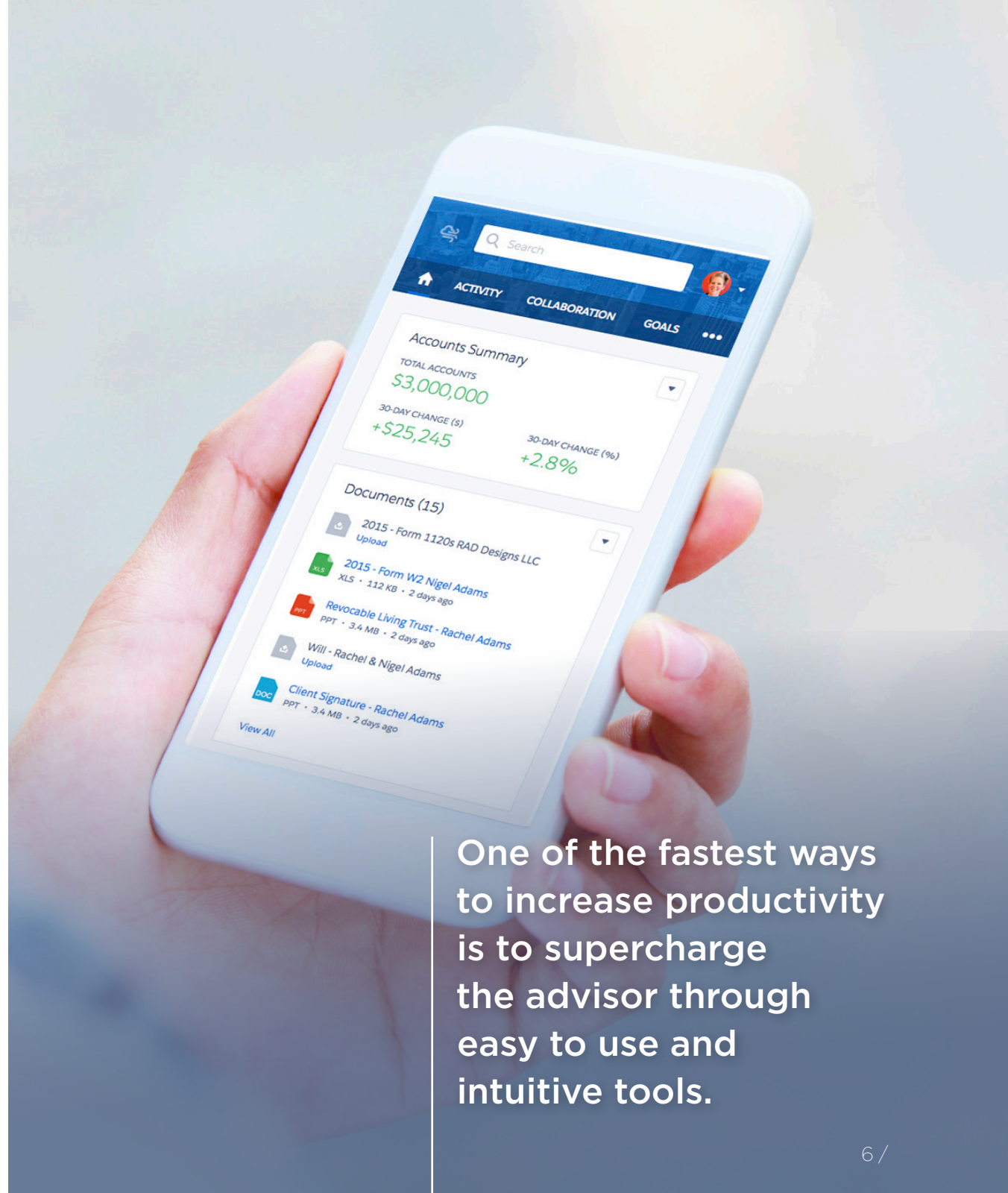
a dialogue with clients on their goals and offers easy access for them to view and collaborate on those objectives. This enriches conversations by giving you important information on life stages, such as when a client wants to buy a house or when a child is heading off to college, allowing you to view these goals in context with the rest of your client interactions and giving you a comprehensive view of the relationship. Because customers collaborate with advisors, they receive the proactive participation in wealth management that many crave. And collaborating with clients on these goals has never been easier using a Salesforce Private Client Community.

Chapter 2

SMART ACTIONS

No matter the industry, increasing productivity is a critical way to stay competitive. That's particularly true in wealth management as a new generation of clients shop around for financial advisors.

One of the fastest ways to increase productivity is to supercharge the advisor through easy to use and intuitive tools. We have created a dynamic user experience inspired by the world of the consumer, making it easy for the advisor to get a holistic view of the clients' portfolio. Each morning, advisors log into Salesforce Financial Services Cloud and are presented with the most important tasks they need to complete each day. This includes a snapshot of their book of business performance and proactive alerts of key activities.



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We have designed workflows, integrations with third party apps and data to enable information to flow proactively to the advisor. This information is shared seamlessly across teams making it easier than ever to provide a consistent experience to clients, no matter who they are engaging with. And the new Salesforce To Do list compiles information from customizable places such as calendars, tasks and opportunities, and arranges them by priority or time, offering a single snapshot of all the critical client-facing items.

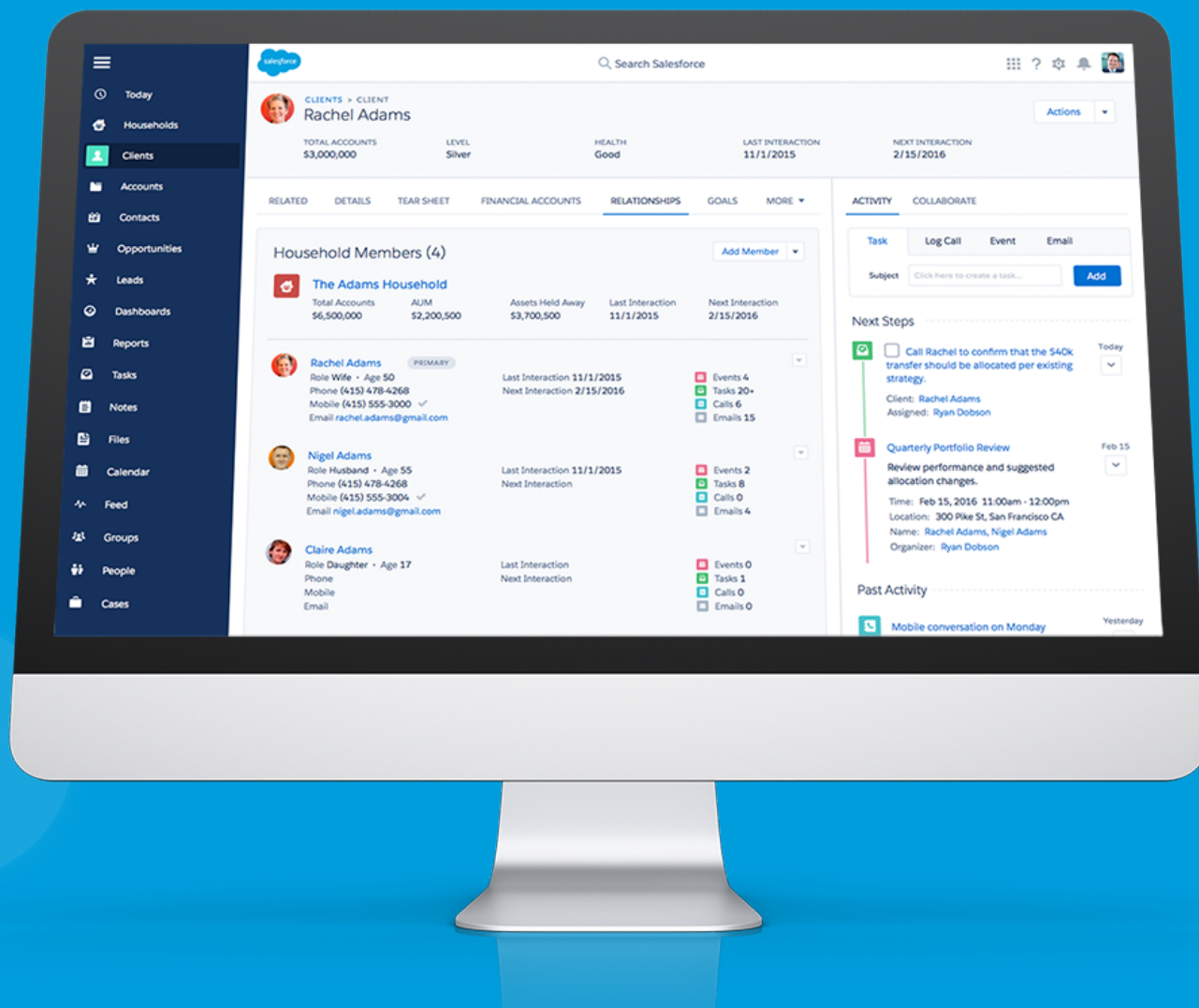
Other features include the ability to see profit and losses from various accounts segmented by size, a review of daily tasks and pending opportunities. Advisors can also review client cases that have questions or issues.

Advisors gain the ability to pull information from disparate sources and unify it. But beyond being an information aggregator, Salesforce Financial Services Cloud brings

everything into context, puts the client at the center of everything, and gives you the information you need to make smart decisions and offer collaborative advice and solutions.

And consolidating client data in Salesforce Financial Services Cloud allows for easy segmentation. Advisors can now take quick actions such as searching for accounts that need to be rebalanced or setting up client groups with pre-designated alerts.

And if you are looking to add more valuable information to Salesforce that is not available in Financial Services Cloud, you can tap into our thriving ecosystem of trusted partners. Data from Yodlee, Informatica, and Advisor Software are all easily integrated into Salesforce Financial Services Cloud, with more partners coming soon.



Chapter 3

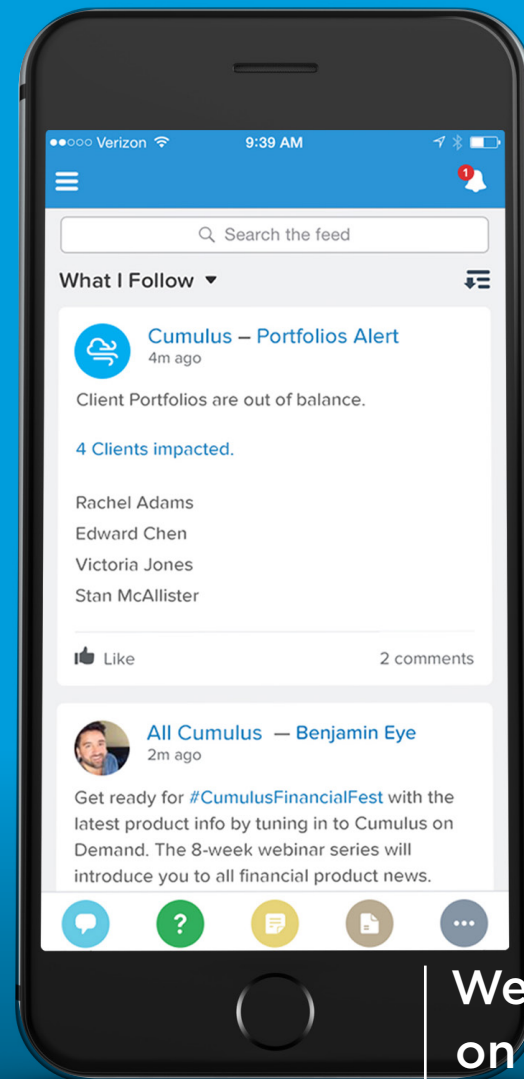
ENGAGE IN REAL-TIME

Collaboration across advisor teams and the broader organization is key to approaching client relationships as a unified front. With Salesforce Financial Services Cloud, you can reduce the silos in your firm by centering activity around the rich client profile and then using a Salesforce Private Client Community to engage directly with clients.

We've connected the advisory team to the client through a powerful communities engagement experience. This frees up collaboration to happen when the client wants, in micro-moments and on the device of their choosing.

Remember, if you have an existing client portal, our 1-to-1 Client Community can be integrated within yours. If you need a Community, you can use ours and connect to other key data sources.

In addition, we know advisors are on the go, and with Salesforce1, you can take everything you love for Salesforce Financial Services Cloud and access it through your choice of mobile devices. Review client tear sheets on your tablet or receive alerts on client meetings on your phone — all easily integrated directly with your client profiles.



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A woman with blonde hair tied back and a man with a shaved head are both smiling and looking at a tablet held by the woman. They are in an office environment with other people blurred in the background.

CONCLUSION

We've built Salesforce Financial Services Cloud on a platform that is directly connected to your enterprise platform strategy. It's not just another app, but a flexible, next-generation platform designed to meet the needs of connected clients.

Pulling information from various sources and integrating it into one platform with proactive alerts means you don't miss an opportunity and that you can spend more time helping clients – and less on administrative tasks. We help you create the relationships clients are looking for, increasing productivity and tailoring solutions for each person. By harnessing the power of our industry-leading software, client information is always available, anywhere.

[Learn More ›](#)

SEE HOW SALESFORCE FINANCIAL SERVICES CLOUD WILL ACCELERATE YOUR PRODUCTIVITY.

[Watch Demo ›](#)



financial services cloud

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THE CUSTOMER SUCCESS PLATFORM