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FSConnect

Private Banking / Wealth

Built on the Salesforce Financial Services Cloud, Deloitte Digital has created a pre-configured private banking accelerator that drives banks to deliver new ways of working that enable a transformative client acquisition and management experience. The solution encompasses a wide range of leading cloud vendors and FinTechs, enabling clients to benefit from pre-integrated partner technologies

Updated as of March 1st, 2021

FEATURES

Intelligent Goal-Based Financial Planning
Use of the OPAL engine to create advanced financial plans, simulations and reports that seamlessly integrate with Salesforce.

Private Bank Customer Portal
Salesforce Community dedicated to Private Banking customers where they can e.g. do goal simulations and view their accounts

Client 360 view
Comprehensive view of the client, including life events, comments, key milestones, primary contact Information, aggregated opportunities, and other data from source systems through and integrated framework

Accelerated Onboarding
Use of Fenergo to facilitate the complex onboarding processes in private banking, including KYC, AML and investor risk profile

Coverage Teams
Custom display where users can associate different individuals to the client to ensure that all roles involved in managing the client are listed, allowing team collaboration and cross-functional transparency.

Interactive Selling
Use of Showpad to deliver relevant content, personalize the selling experience and share marketing materials.

BENEFITS

- Drive higher employee satisfaction by building a more digitally-enabled workplace and helps with retaining and attracting talent
- Drive direct cost savings by replacing existing front office systems with Salesforce, reducing overall maintenance and licensing costs
- Enhance client experience where clients see wealth and private banking teams as trusted advisors and managers
- Accelerate revenue growth and retention through more timely and relevant client interactions supported by a 360 client view and data insights
- Increase advisor/client manager productivity by creating more client-facing time through reduction of administrative tasks with mobile access for events, notes, and self-serve reporting

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