



FSConnect

Retail Banking

FSConnect for Retail Banking integrates Salesforce Financial Services Cloud into banker journeys to create client experiences that are data-driven, consistent across channels, and complete with personalized advice. By leveraging data, advanced Customer Relationship Management (CRM) capabilities, and AI, banks can better anticipate solutions to serve their clients.

FEATURES

AI-powered insights

Readily accessible, synthesized insight into customers' financial goals, context, and prior interactions

Real-time performance analytics

Guided analytics for assisted interactions and financial advice to create consistency in richer client interactions

Guided workflows for digital transactions

Automated routine day-to-day tasks enabling automation to providing a seamless experience to retail bankers to increase customer impact

Omni-channel engagement

Real-time customer communication through call, text, video, emails providing great flexibility to increase contact with customers

Integrated service management

Centralized customer data feeds into service capabilities to seamlessly support account management, resolving client issues, and cross-selling products and services

Banking 360 Consoles

Tailored console hubs dedicated to branch banking, contact center agents, and hybrid servicing models each focusing on user value and minimizing complexity (homepage, client servicing, opportunities, etc.)

BENEFITS



Robust and accurate client insights that allow bankers to have focused and meaningful client conversations



Pre-configured capabilities have the power to reduce cost of service while unlocking valuable customer insights



Visibility into specific client data and needs to efficiently serve clients and provide tailored recommendations



Enable's bankers to deliver informed customer experience and quicker resolution to issues



Consistency in process, data management, and documentation across all banking engagements

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