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Capgemini Wealth Management Advisor Desktop Solution (ADS)

Solution FAQ

People matter, results count.

The Advisor Desktop Solution shapes an organization's productivity strategy. The solution becomes a one-stop-shop for financial advisors to consolidate daily activities across the entire wealth management value chain and bring clients' overall experience in-line with new levels of digital expectations. Engage with your customers across all channels to increase revenue and retention. Specifically tailored to attract and retain Financial Advisors and their modern, high-net-worth clientele by using technology platform as an enabler.

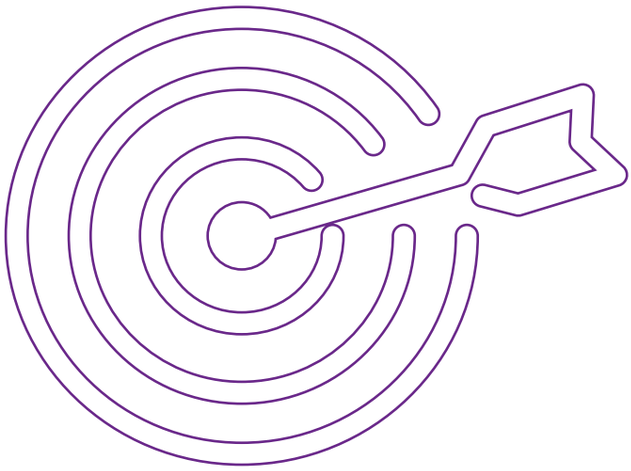
Frequently Asked Questions – FAQs

What are the trends in Wealth Management?

A growing segment of Wealth Management clients are going digital and moving away from the traditional brick-and-mortar experience. The World Wealth Report from 2014 reveals that 57% of high net worth individuals consider entire or most of current wealth management relationship to be Digital and 65% would consider leaving their wealth management firm if an integrated client experience is not provided. These new digital expectations are forcing Wealth Management Advisors to engage with customers in a different manner, on a multitude of channels, and with an understanding of who they are and what they want.

What are the market and trends driving WM ADS?

Improved organizational effectiveness by driving advisor enablement, demand for increased collaboration and online migration of interactions with customers, especially social media, are key pieces of the puzzle that Wealth Management ADS helps advisors solve. By engaging customers online, on social media, by phone, and mobile, advisors can interact with customers on the channels they prefer and better understand them.



What is the target market for WM ADS – industry segment, co. size, etc.

Firms across the financial services industry, including all size banks, wealth management, private banking, asset management and insurance firms are target prospects. They are looking to streamline their advisory lifecycle, attract and retain advisors by using technology as an enabler and expand their reach to the growing population of younger, wealthier customers.

What is the target customer profile?

Companies that:

- are unable to provide one-stop-shop advisor workstation experience to their financial advisors & support staff
- are failing to connect seamlessly with their customer across all interaction channels
- want a better customer engagement and relationship management
- are growing their social interaction strategy
- want a 360 degree view of their customers
- want to be able to put the right products in the right channels for the right customers
- want to promote advisor enablement / productivity via value-added tools and utilities

Who is the audience for WM ADS?

WM LOB head, Business heads, Marketing BU leads, CTO/CIO

Does WM ADS have global scope?

Yes, Advisor Desktop is applicable to all geographies

What is Capgemini's WM ADS offering?

Capgemini combines industry leading Wealth Management and Salesforce experience to provide innovative solutions. Advisor Desktop solution is a one-stop shop to enable financial advisors to manage their daily activities across the entire wealth management value chain. The Advisor Desktop solution shapes an organizations' productivity strategy via integrating disparate data and systems with CRM solutions and core advisory systems/tools, making this integration seamless to the end user and providing scalability in highly integrated environments.

Some key features are –

- Financial Advisor Dashboard for a financial advisor to conduct all client business without the need to jump from applications to application
- Integration with social media to support proactive prospecting
- Beyond Client360 to maintain client trust through pro-activeness and improved advisor competency

Has the WM ADS been deployed? – give examples

Wealth Management ADS has been implemented successfully at two Large North American Financial Services organizations. This is an internal reference only. Please consult the Wealth Management ADS for AE's deck for more case study details.

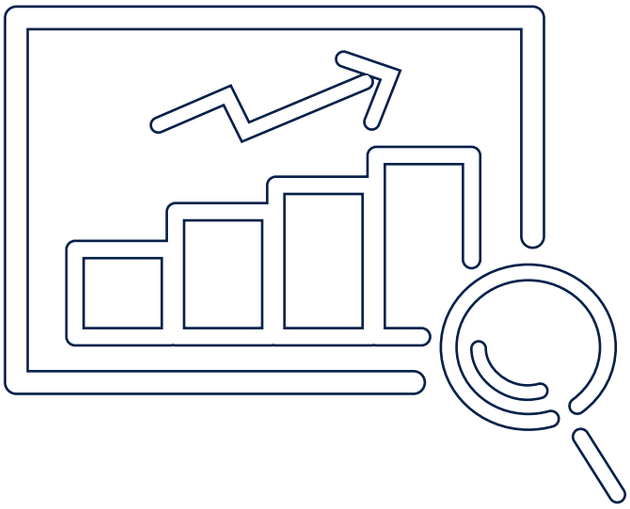
What is the value and ROI to customers of WM ADS?

Benefits of Advisor Desktop Solution are:

- Enhances advisor productivity by ~25%
- Increases client face time by 15-20%
- Improves client service level quality / governance by ~40%
- Reduces advisor on-boarding time by ~30%

What are the benefits of the WM ADS offering?

- Improved advisor efficiency by reducing manual process via context passing & data integration
- Increased revenue opportunities by maximizing client interaction and improving cross-selling opportunities
- Proactive prospecting via integrated widgets
- Improved client satisfaction through transparent operations via a fully integrated platform
- Reduced advisor on-boarding time
- Reduced costs through consolidation redundant applications



What assets are available publicly for WM ADS?

Advisor Desktop Brochure; PPT presentation and FAQ's

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About Capgemini

Now with 180,000 people in over 40 countries, Capgemini is one of the world's foremost providers of consulting, technology and outsourcing services. The Group reported 2014 global revenues of EUR 10.573 billion. Together with its clients, Capgemini creates and delivers business, technology and digital solutions that fit their needs, enabling them to achieve innovation and competitiveness. A deeply multicultural organization, Capgemini has developed its own way of working, the Collaborative Business ExperienceTM, and draws on Rightshore®, its worldwide delivery model.

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