

Capgemini 



Premier Service Solution Banking



Industry Insights



Customer expectations lead the list of reasons banks are seeing an exodus of their client relationships to non-traditional players. Customers expect a universal, client-centric perspective on their relationship and digital self-servicing capabilities are paramount to successfully retaining and winning these clients.

Cross channel (Branch, Mobile App, Internet) satisfaction levels continue to be low, with only 50% of the customer base citing a positive experience. While banks are leveraging technology with a focus on operational efficiency and front-end digitization, banks must be sure not to neglect customers through an impersonal engagement model or a lack of product/service related data at the proper channel (Branch, Mobile App, Internet) which is necessary to drive client satisfaction.

With additional competition in financial services, positive client experiences will drive stickiness (retention) of the relationship more than ever. Tech savvy customers are more than 30% more likely to switch to a disruptive competitor like Google, Apple, or Amazon for their financial services needs when those competitors begin offering comparable products. Traditional banks cannot afford to lose a large chunk of their client base who traditionally are less expensive to maintain because of the client desire to self-serve. Banks must give them tools and resources to ensure a consistent experience regardless of which channel the customer enters.

Capgemini in collaboration with Efma produces a series of industry specific studies designed to inform our clients of trends and themes throughout financial services. For additional information, please visit us at: <https://worldretailbankingreport.com>



Capgemini's Premier Self-Service Solution combines self-service capabilities with an end-to-end customer service solution utilizing Salesforce Service Cloud, Customer Communities, and Sales Cloud.

Focusing on the customer experience, the solution can provide self-service articles, online application flows, visibility into currently owned products, and Einstein bots to provide customers the ability to self-service, driving efficiency and reducing demand on other service channels.

The employee experience can be enhanced by use of internal knowledge documents serving up relevant documentation to employees, CTI integration with Amazon Connect, warm transfers from bots to service reps, and guided servicing actions using lightning flows. This solution can be easily utilized to improve client satisfaction, expedite requests, and provide savvy customers the tools they expect to manage their financial relationship within your organization.



Premier Service for Banking Solution Highlights

- Built leveraging Salesforce Financial Services Cloud (FSC)
- Utilizes a “CONFIGURATION FIRST” methodology
- Employs platform provided tools like Lightning Flows, Lightning Web Components, Communities, and Einstein
- Drives faster project delivery with rapid time to value and an improved return on your technology investment.



Why Salesforce?

- Market leader in Customer Relationship Management
- Inherent Community Cloud model which seamlessly brings customers into the process.
- Extensive data model that easily enables aggregation of data across multiple source systems into one convenient relationship view
- Robust permissions, entitlements, profile, and role configurations that powerfully protect customer information
- Cloud leader with mobility across devices for both employees and customers
- Reporting and analytics to give you a better understanding of KPIs around service requests.
- Ease of configurability ensures seamless changes without the need to be beholden to a vendor



Benefits of Capgemini's Premier Service for Banking Solutions

Create efficiency, reduce expenses associated with service requests, and drive revenue by increasing client satisfaction

- Faster project timelines using our accelerators, enhanced data model, baseline implementation, and prebuilt lightning components will result in faster and higher return on your technology investment.
- Easier long-term maintenance and upgrades will save money over alternatives.
- The solution can be modified by your administrators with clicks not code, ensuring rapid deployment in response to ever-changing requirements
- Provide the bank's customer with self-service mechanisms thru a portal (Community) where they can perform activities like updating financials, uploading documentation, managing their net worth all of which create actionable records to help drive organic growth while giving the client a view of their financial position and the ability to securely upload documentation requirements from the convenience of their home.
- We understand banking! Our strategy and POV are designed and built by bankers with extensive industry and Salesforce experience across multiple clouds with a focus on optimizing customer interactions, driving customer satisfaction and increasing relationship profitability.



Common Challenges Addressed with Capgemini's Premier Service – Financial Services

Customer View – Empower your customers with the information they need to trust you as a financial partner. Enable the customer to see open service requests, fulfill requests themselves using the community, give the customer access to tools like calculators, and use all this captured information for more value-added interactions

Compliance - Pre-built lightning flows that are 100% configurable and designed to be utilized across numerous use cases including KYC/AML/Suitability. These flows are designed so that as regulations change updates can be made with clicks, not code by a bank's administrator.

Service Consistency – Provide your customers with consistent interactions regardless of the service channel of interaction using our pre-built, configurable lightning flows.

Customer Self-Service – Use Einstein within customer communities to expose relevant knowledge articles to customers and bots to handle common service requests.

Elevated Conversations – Enable customers to update their goals, life events, even their accounts held elsewhere in order to get a comprehensive view of their financial situation.

Client Comparison – Use the client provided information to give the customer comparative understanding of their financial situation with that of their peers

Next Best Offer / Action – Proactively suggest products and services to the client directly using information we already know about them coupled with the information they self-disclose.

Referral Management – Automate referrals and introductions of clients across lines of business when the situation warrants the introduction of teammates.



Capgemini is the right partner!

Capgemini's Salesforce experience is widely recognized in the market.

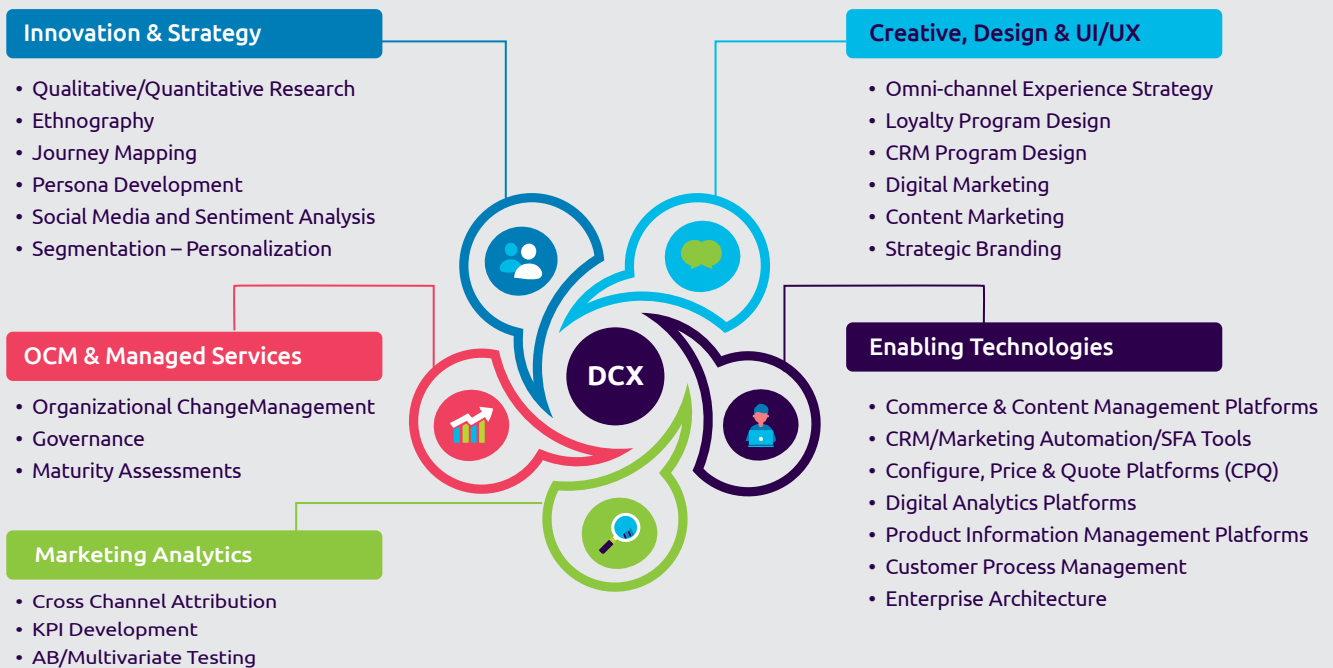
- Recognized by Salesforce as a "Global Strategic Consulting Partner"
- Ranked on Salesforce implementation partners as a "Leader" by Forrester Research, Inc.
- Positioned as a Leader in Gartner's Magic Quadrant Reports
- Recognized as CRM Market Leader by Constellation Research
- Salesforce Partner Innovation Award winner



Capgemini's Salesforce Practice is one of the strongest and most qualified in the world.

- 11 Year Partnership with Salesforce
- 550+ Clients in our global Salesforce Portfolio
- 3000+ Certified Salesforce consultants with over 5000 certifications

Our Salesforce Practice is aligned with Capgemini's Digital Customer Experience Program, with an entire portfolio of offerings



About Capgemini

Capgemini is a global leader in consulting, digital transformation, technology and engineering services. The Group is at the forefront of innovation to address the entire breadth of clients' opportunities in the evolving world of cloud, digital and platforms.

Building on its strong 50-year+ heritage and deep industry-specific expertise, Capgemini enables organizations to realize their business ambitions through an array of services from strategy to operations. Capgemini is driven by the conviction that the business value of technology comes from and through people. Today, it is a multicultural company of 270,000 team members in almost 50 countries. With Altran, the Group reported 2019 combined revenues of €17 billion.

Learn more about us at

www.capgemini.com

People matter, results count.

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