



3 Ways to Connect and Collaborate with More Flexibility and Security for Better Client and Employee Experiences

DIGITAL INTERACTIONS HAVE SKYROCKETED IN POPULARITY, TRANSFORMING INDUSTRIES FOREVER — INCLUDING FINANCIAL SERVICES

Whether your business is insurance, mortgage lending, banking, or a credit union, the last year has likely forced your operations to go digital virtually overnight—and exposed gaps in digital and security capabilities. But what may have seemed a headwind has now turned into a tailwind, as you accelerate digitization in the coming year from what may have been planned as a five-year transformation. As you advance your company's digital capabilities, remember that the two constituents who matter most are your customers and your employees. Cloud communication and collaboration technology lets you enable and empower both to ease engagement and improve customer service, regardless of location. Prospects and customers enjoy a better experience, because they can always reach whoever they need to in your company and benefit from integrated, omnichannel systems that maintain consistency from the first conversation to closing the deal. Employees (and your recruiting strategy) gain flexibility—you can staff your service representative team in a more distributed, cost-effective manner.

Let's take a look at how digital-first cloud communications will enable a better customer experience, empower mobility and support working from wherever, while also supporting your security and compliance efforts.

THE CUSTOMER EXPERIENCE

Help customers help themselves.

Tech-savvy millennials (aged 22-40) represent 43%* of the mortgage market and expect all digital interactions to equal the convenience, speed, and ease of Amazon or Instagram. Digital self-service is key to winning their business. That has implications not just for your business's web presence and mobile app capabilities but also for automated communications and speedy issue resolution. Customers have come to expect proactive notices via text message or email—whether about monthly statements or balances or mortgage payments. Millennials aside, delivering a positive customer experience means enabling quick access to assistance (so the customer feels prioritized); choice to engage however and whenever they want (so they feel in control); a personalized experience (so they feel like you know them); great service quality (so they feel well-served); and convenience across interactions (so there is no friction between contact and receiving value).

Contact Center improves customer interactions for businesses of all sizes. With customizable call flows and a unified experience across channels, service teams can respond quickly and confidently. Real-time insights help guide live conversations, while post-call automation helps employees get to the next call and makes follow-ups faster and more accurate. Supervisors also gain live visibility into interactions to support in the moment and coach with greater precision.

*Source:

https://cdn.nar.realtor/sites/default/files/documents/2022-home-buyers-and-sellers-generational-trends-03-23-2022.pdf?mf_ct_campaign=yahoo-synd-feed

Benefits



Dynamic Notifications

Send outbound voice, SMS and email notifications so you can contact your customers using their preferred method of communication.



Interactive Voice Response

Help customers with more straightforward concerns (e.g. checking an account balance or paying a bill) self-serve without using up the time of a live agent.



Speedy Interactions

Real-time insights, preserved communications, and post-call summaries give agents immediate context—so they can personalize service, reduce handle time and disputes, and ensure nothing falls through the cracks.



MOBILITY

Satisfy hybrid work models and maintain productivity from wherever.

You and your employees need to be able to work flexibly whether in the office, at home, in transit, or at another office or branch location. And your customers must experience seamless, consistent communications, which means you maintain the thread of your conversations over time as they continue across channels from a home office to the main office, and everywhere in between.

Our Unified Communication [UC] platform seamlessly integrates all your communications tools—desktop phones, mobile phones, and computers—into one manageable solution that flexibly accommodates employee needs and workplaces while ensuring a business-centric and consistent customer experience. Built-in intelligence also supports remote teams with live visibility and guided interactions—helping supervisors and agents stay aligned, no matter where they work.

Benefits



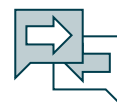
Consistency

Customers will always see the business phone number, whether your employees call from their laptop, mobile phone, office phone, or contact center.



Flexibility

Video conferencing participants can join meetings from their desktop or mobile devices, wherever they are.



Easy to Use

Chat messages automatically sync across mobile and desktop apps, so teams can stay connected and access conversations from wherever they work.

COMPLIANCE AND SECURITY

Manage risk and adhere to regulations, standards, laws, and policies.

From Dodd-Frank to the Affordable Care Act to SOC2 compliance, you and your compliance officer must regularly conduct audits of processes, systems, services, files, and more to ensure compliance with industry regulations and manage risk. For instance, the Financial Privacy Rule requires financial institutions to provide each consumer with a privacy notice, explaining where info is shared, how it is used, and how it is protected at the time it establishes the consumer relationship and annually thereafter. Managing risk is more challenging, as 2022 was a banner year for data breaches and cyber attacks. Offline access to data on a 24/7 basis is key, as is redundant storage, an uptime SLA, configurable retention policies, data encryption, and more.

Our UC solution is an integrated cloud communications platform with security and privacy controls that address a wide range of financial and insurance services regulations. It combines a phone system with desktop and mobile apps, video conferencing, team chat and business SMS, as well as file collaboration and backup capabilities. A cloud-native contact center (or customer service team) solution can be deployed as a feature or add-on to our UC platform or acquired stand-alone. Additionally, the Archiving add-on service allows your business to automatically store, protect, and quickly retrieve your communications data whenever you need it. Everything you need to succeed in today's high-pressure business climate is included—from encrypting sensitive correspondence, proposals and research to collaborating on due diligence with private room access controls for documents. All this is available to your team whether they're in the office or on the road, with full support for mobile devices.

Benefits



Secure Data

Your files and voicemails can be encrypted at rest and in transit, and you never need to worry about losing a file, since two copies are always backed up.



Secure Meetings

Stop unwanted meeting participants by ensuring no one can join your virtual conference before you do, or lock the meeting after all are present to prevent anyone else from joining.



Security Compliance

Audits are manageable when your communication and collaboration solution provider has security, privacy controls and archived records that address FINRA, GDPR, HIPAA, Sarbanes-Oxley, and more.



Data Retention

Communications can be captured automatically and retained for as long as the business case requires - with retention options ranging up to ten years.

QUESTIONS? CONTACT US TODAY!