Power Apps

Power Automate

Xpedition

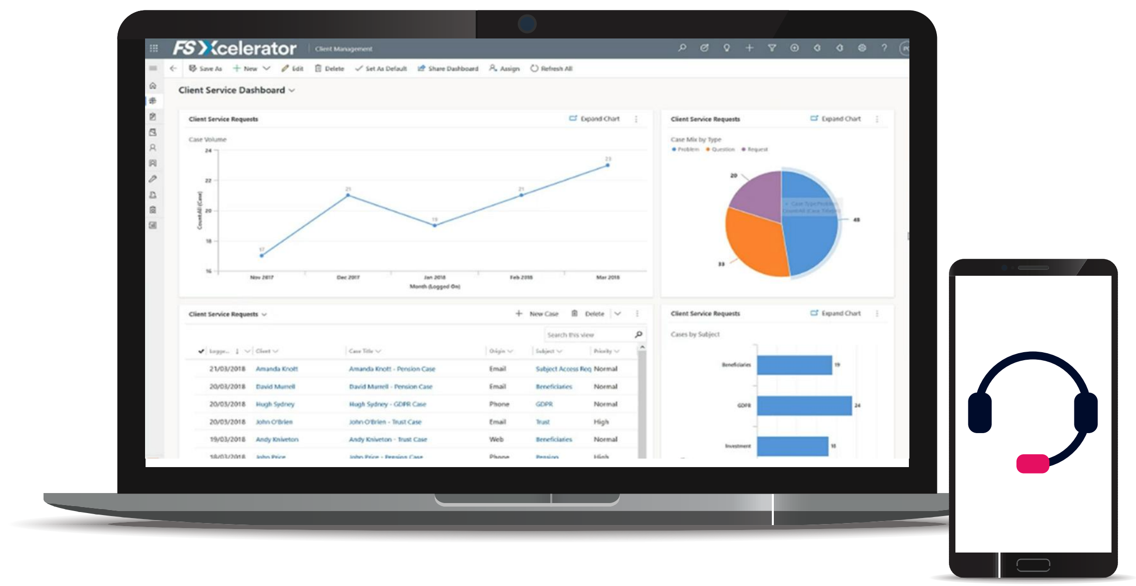
FS Xcelerator

Deliver the omnichannel experience that meets the expectations of today's clients

Client Services App

The way clients engage with financial services firms is constantly evolving. With increasing competition from digital disruptors and clients expecting that engagements will be streamlined, personalised, holistic interactions, all financial services firms, from retail banks and insurance firms to private banks and wealth management firms, need to ensure they are delivering an optimal client experience.

With the Client Services App, firms can take advantage of the rich amount of omnichannel customer services features of Microsoft Dynamics 365 to drive the sophisticated, personalised, digital experience clients have come to expect in the modern world.



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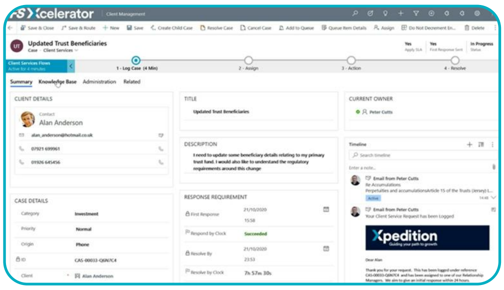
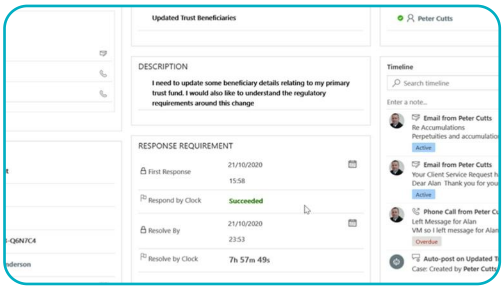
Key Features and Benefits



Fully configurable, sophisticated case management

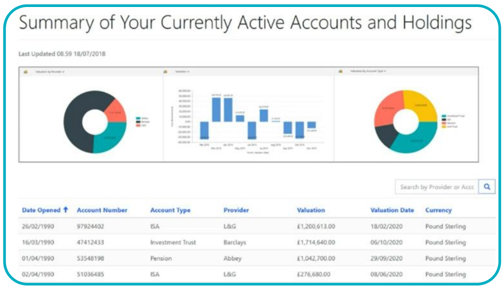
Bespoke case management capabilities allow for the capture of many different types of client requirements. These range from managing personal information updates and enquiries regarding investments to escalating and resolving complaints and GDPR requests.

Cases can be generated manually, direct from phone calls, automatically from email, or through a secure client portal. Once in the system, different case process flows may be created to a firm's precise requirements using a simple drag and drop designer.



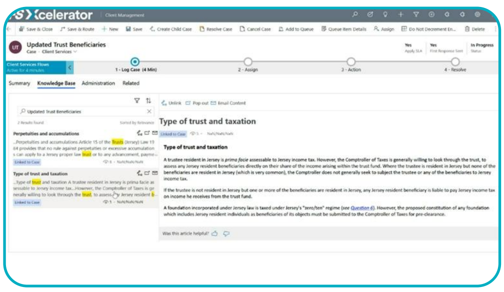
Advanced Case escalation to help ensure client satisfaction

Case escalation focuses increased attention on a particular client issue and provides a way for the firm to track and resolve complaints and cases efficiently. Response and resolution times can be automatically set based upon attributes such as the type of case, the particular client or on regulatory requirements. Workflows automate the creation of responses and updates for the client, ensuring they are kept up to date on progress, or prompted when action is required on their part. All email, phone call and client portal activities are tracked directly against each case.



24/7, access anywhere self-service client portal

Build bespoke, branded portals for clients to carry out self-service tasks. These include updating personal details, viewing investments, logging queries and cases, raising complaints, and accessing a comprehensive Knowledgebase of helpful articles. Client actions are fully controlled according to the firm's policies and advanced features such as automated virtual assistants may also be incorporated.



Help clients resolve queries faster thanks to a comprehensive knowledgebase

Clients and employees can access a comprehensive knowledgebase that provides a wealth of helpful articles, frequently asked questions (FAQs) and regulatory information that helps identify solutions to queries. Articles can be suggested by the system or manually searched to quickly locate a potential resolution and can be accessed by the client or sent by the firm to the client directly.

Get in touch to learn how the Client Services App can help you deliver the modern, integrated, streamlined experience clients have to come to expect.

Speak to a specialist today.

To learn more about Xpedition, visit:

xpedition.co.uk

Or contact us on

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