

Financial Services Cloud for Retail Banking

Be the Bank Your Customers Love

Banking has entered the Age of the Customer, and customers are comparing your bank against any company that engages consumers with seamless experiences. Convenience is the new loyalty, and banks need to provide the speed, intelligence, and connectivity that customers now expect.

Built on the Salesforce Platform and designed specifically for high transaction-volume use cases, Financial Services Cloud for Retail Banking helps banks drive customer loyalty by bridging line-of-business gaps, intelligently surfacing customer needs, and supercharging banker productivity.

REALIZE VALUE FASTER: Accelerate implementation with out-of-the-box functionality built on the Salesforce Platform such as a banking data model, financial account objects and rollups, cross-line-of-business referral management, and tools for needs assessments and task orchestration.

CONTINUOUS INNOVATION: With three Financial Services Cloud releases a year, advisors can accelerate business growth and maintain a competitive edge with new product features and enhancements integrated automatically into the Salesforce Platform.

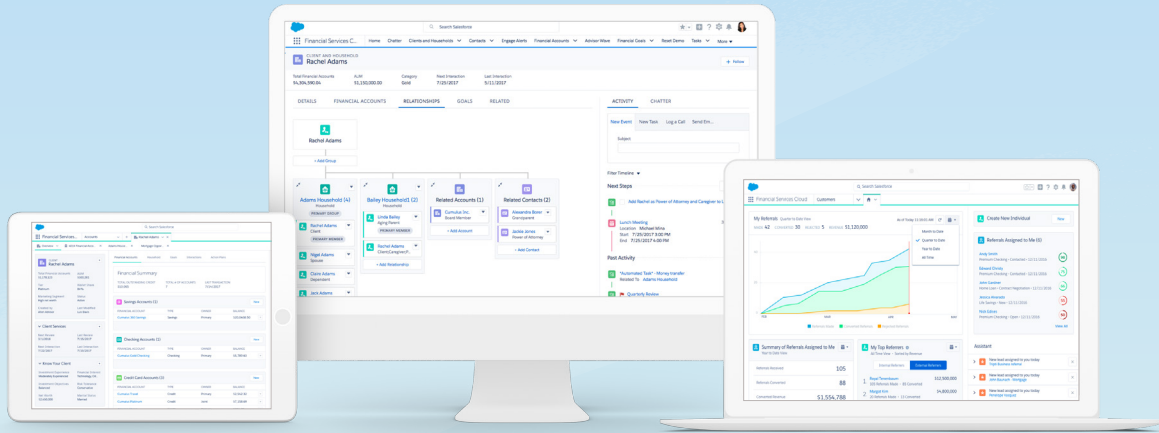
ACCESS AN OPEN BANKING ECOSYSTEM: Leverage flexible APIs to integrate Financial Services Cloud with core banking systems and best-of-breed partners offering solutions from loan origination to identity management.

“Financial Services Cloud offers something for everyone and brings the entire credit union together. We’re connecting lines of business, systems, and processes to build deeper relationships with our members.”

SEAN WORTHY
VP of Digital Strategy, PenFed Credit Union



Financial Services Cloud for Retail Banking Feature Set



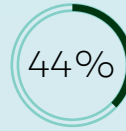
UNLOCK THE FULL POWER OF THE BANK



INCREASE IN
CLIENT
SATISFACTION*

- **Referral Scores:** Understand who your highest priority referrals are and take action quickly based on intelligent scoring and insights.
- **Referrer Management:** Nurture relationships with top referrers based on rich profiles and scores that show who consistently sources great customers for your bank.
- **Record Types and Fields:** Easily track and work referrals and ensure they are addressing real financial needs with visibility into customers' expressed interest.

COLLABORATE SEAMLESSLY



FASTER
INTEGRATION*

- **Customizable Communities:** Ensure customers can collaborate with their relationship managers to provide data about their financial holdings and needs.
- **Referral Components:** Embed custom and managed components within responsive, online communities to source referrals from individuals within their circles of influence.
- **Community App Builder:** Rapidly customize your banking communities, using clicks rather than code, to meet evolving customer preferences.

SUPERCHARGE BANKER PRODUCTIVITY



INCREASE IN
ADVISOR
PRODUCTIVITY*

- **Banker Console:** Manage high-priority referrals, top referrers, upcoming tasks, and key customer milestones from a single user interface built in Lightning.
- **Analytics Quick Actions:** Take action at the point of insight by recording key activities such as calls, tasks, or events without leaving the Einstein Analytics app.
- **Cases and Alerts:** Link financial accounts, customers, or households to a specific case to ensure that service agents have the necessary information to resolve issues.

KNOW YOUR CUSTOMERS AND THEIR NEEDS



FASTER
DECISION-MAKING*

- **Relationship Builder and Map:** Link customers with households, trusts, and business groups, and visualize key relationships within a customer's circle of influence.
- **Financial Accounts and Rollups:** Gain visibility into a customer's financial accounts and holdings so you can deliver relevant products and services for their needs.
- **Education, Employment, and ID Objects:** Know more about who your customers are and how you can best serve them with objects containing key information about customer profiles.

GO FROM AI TO ROI

Leveraging the power of artificial intelligence, **Financial Services Cloud Einstein** powers predictive, needs-based journeys for prospects and customers, proactively recommends next best actions, and provides real-time answers to customer inquiries across any channel. Now banks can get smarter about their customers with a data scientist built right into Salesforce.

Sign up today for a Financial Services Cloud trial. bit.ly/TryFSCfree

* Voice of the Salesforce Financial Services Customer Survey