Financial Services Checklist

Ensure both flexibility and compliance while taking care of customers

A FULLY INTEGRATED CLOUD COMMUNICATIONS PLATFORM ALLOWS YOUR EMPLOYEES TO SERVE CUSTOMERS FROM WHEREVER, WHILE ALSO SUPPORTING YOUR COMPLIANCE AND SECURITY NEEDS:

- Help customers help themselves with basic needs, like checking an account balance, and free customer service agents to spend time on more complex customer needs.

- Customers always see your business phone number whether your employees are connecting with them from home, via mobile phone, or from the office.

- Your service reps can get real-time customer insights for quick context, helping them deliver more informed responses that shorten times to resolution.

- Audits are manageable when your cloud services provider has security and privacy controls that address FINRA, GDPR, SOC2, Sarbanes-Oxley, and more.

ONE COMMUNICATIONS PLATFORM **- ONE** LOW MONTHLY RATE

PHONE | VIDEO | CHAT| CONTACT CENTER | FILES | EMAIL

COMMON ISSUES FACING THE FINANCIAL SERVICES INDUSTRY

- With credit union and mortgage brokers seeking to improve customer satisfaction scores[1], your communications technology needs to empower service reps to deliver quick, high-value customer service as well as help tech-savvy millennials help themselves.

- Pandemic-driven hybrid work models have accelerated digital transformation and require communications and collaborations technology that supports working from wherever—and customer contact from wherever.

- Regular audits and risk management require providers to support compliance requirements.

- The cost efficiency of cloud communications is causing many in the industry to switch out legacy phone systems.

OUR SOLUTIONS CAN HELP SOLVE THESE ISSUES

	YOUR NEEDS	OUR SOLUTIONS
DELIVER SUPERIOR CUSTOMER EXPERIENCE	☐ Seamless client communications and customer-centric channels	✔ Elevate integrates voice, chat, and video conferencing interactions on one platform
	☐ Ensuring customer needs are met quickly by the right resource or service rep	✔ With Elevate Contact Center, you can easily customize call flow to assign the right agent at the right time, and QA features deliver exceptional results
	☐ Accommodate customers who are digitally native and expect more	✔ Turn your customer service capability into an outreach powerhouse with dynamic notifications
	☐ Make sure customers don't have to repeat themselves each time they contact you about a single issue	✔ Contact Center's real-time insights get service reps into context quickly, helping to deliver more informed responses that shorten times to resolution. Plus, deep historical reporting helps improve future interactions.
	☐ Extend reach and facilitate faster response times for client inquiries	✔ Contact Center dynamic notifications proactively send reminders or any communication while respecting the client's preferences
MOBILITY AND FLEXIBILITY	☐ Ensure employees can be productive whether they work at home, in the office, while commuting, or some mix of locations	✔ As a tightly integrated platform, Elevate ensures consistent communications regardless of where your employees are
	☐ Give customers a seamless and consistent communications experience across channels and over time	✔ Chat and SMS automatically synchronize across mobile & desktop apps, and real-time customer insights speed service rep-customer interactions
	☐ Allow video conferencing participants to join meetings from wherever	✔ Elevate lets meeting participants join from mobile phones, desktops, laptops
	☐ Ensure customers receive a consistent experience	✔ Voice, chat, and email queues combine into a single omni-channel experience
	☐ Accommodate distributed service rep teams and multiple branch locations	✔ Anytime, anywhere communications from any device

YOUR NEEDS	OUR SOLUTIONS
☐ Manage risk by ensuring cloud service providers are independently audited	✔ Elevate is SOC 2 audited, which attests to our high security standards—for our products, networks, infrastructure, and privacy protection
☐ Protect or encrypt confidential client correspondence, files, text messages, voicemails, and email	✔ Emails, files, video conference recordings, and more can be secured at rest and while in transit
☐ Share documents securely	✔ Account-level encryption keys secure stored documents, and SSL/TLS secures them as you share them
☐ Choose cloud service providers with high uptime SLAs	✔ Our cloud is purpose-built for 99.999% uptime with a financially backed SLA
☐ Ease the audit process with configurable file retention policies, long-term storage, and by enabling access to archives by specific roles	✔ Elevate offers secure, low-cost, and long-term storage with support for and indexing of relevant data types and formats and role-based permissions for accessing archives
☐ Avoid use of and protect disclosure of employee mobile phone numbers	✔ Callers see your business phone number, whether employees are engaging from their mobile phones, desktop phones, or a remote service location
☐ Have confidence that your cloud services providers take security measures that facilitate regulatory compliance	✔ Elevate is independently audited and offers security protection across seven pillars
☐ Protect your business files against malware, viruses, and cyber crime	✔ Elevate quarantines infected files and integrates Sophos anti-malware capability

(Left vertical section label: SECURE CLIENT COMMUNICATIONS AND INDUSTRY COMPLIANCE)

YOUR NEEDS	OUR SOLUTIONS
☐ Ensure cost efficient communications and collaboration without sacrificing quality or features	✔ Elevate offers 90+ enterprise-grade calling features and excellent network call quality and uptime
	✔ Flat, per-user rates with no annual contracts, no hidden fees, no hardware to buy, manage install, or replace
	✔ A single web-based portal lets you configure the system and manage call reporting
☐ Easier configuration and deployment	✔ Elevate tightly integrates desk phones, mobile phones, chat, SMS, video conferencing, screen sharing, file sharing, and file backup to facilitate increased collaboration and productivity
☐ Supplement desk phones with other communication channels	✔ Elevate automatically rings all your end points with every call in the event you don't answer and routes the call to any number you choose
☐ Ensure business continuity	✔ Intermedia Unite automatically rings all your end points with every call in the event

(Left vertical section label: PUT AN END TO LEGACY PHONE SYSTEM COSTS)

1. https://www.theacsi.org/index.php?option=com_content&view=article&id=149&catid=&Itemid=214&i=Credit+Unions

Contact us today to find out how a fully integrated cloud communications platform can help your financial services firm thrive and grow.

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