



FSCConnect

Investment Banking

FSCConnect for Investment Banking brings to life our industry experience in transforming productivity in the front office, through banker-focused functionality and third-party data sources, informing the consideration and design of Salesforce implementations.

FEATURES

Pre-defined personas and journeys

Fully crafted IBD specific personas and journeys ensures a Human Centered Design approach. Key "Moments that Matter" guarantee focus on highest value areas of enablement.

Aspirational banker storyboard

Vision of the Future allows clients to see what's possible and set clear program goals. Seamlessly incorporates third party data sources and AppExchange partner to complete the vision.

IBD Salesforce live

Key personas and user journeys enabled to showcase IBD specific perspective in the FSC framework. This also includes sample third party data products to support Client 360 and automation as well as AppExchange partners. Continuously updated to incorporate new features.

Sales analytics

Tableau CRM powering sales pipeline dashboards and banker scorecards, and the visualisation of M&A market data. Consolidation and visualisation of key banker KPIs for product and coverage bankers.

Capability maps and sizing

IBD specific capability map outlining key functional requirements at epic level, which is continuously updated to incorporate recent work. Effort sizing catalogue aligned to the capability map to provide effort and assumptions based on delivery experience.

Deal and client management

Predefined deal processes, key data requirements including regulatory and compliance, and revenue schedule creation. Client management functionality, including automated client tear sheet and pitch book generation.

BENEFITS



Better insight into customer interactions and experiences to date enabled by centralized data



Operational efficiencies realized via intelligent nudging to act on internal and client data points



360 view of contacts, including 'who knows who' relationship management, and visibility into recent conversations to drive meaningful communication



Reduces the number of disconnected systems and data sources that employees and customers interact with driving a seamless experience



Snapshots of performance by region, product, or industry help quickly identify white space to drive new opportunities

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