salesforce | Deloitte. Digital

FSConnect

Private Banking/Wealth

FSConnect for Private Banking/Wealth is an accelerated banking solution by Deloitte Digital that extends the functionality of Salesforce's Cloud Products.
The asset is designed to rapidly create and enhance value for private banking and wealth management financial advisors and partners.
The solution encompasses a wide range of leading cloud vendors and FinTechs, enabling clients to benefit from pre-integrated partner technologies.

FEATURES

Intelligent goal-based financial planning

Integrate with market-leading vendors to enable client needs analysis, financial planning, simulations and reports that seamlessly integrate with Salesforce. Proactive monitoring of goals and wealth plans of your clients.

Actionable & insight driven dashboards

Custom designed homepage & performance dashboards for Private Banking through use of Tableau CRM for customer churn.

720° Customer View Improvement

Enrichment of the 720° Customer Page with Private Banking/Wealth specific attributes, focused on client interactions, life events, key milestones, next best actions and smart alerts/notifications, aggregated opportunities, wealth specific preference & subscriptions and other data.

Accelerated onboarding

Use of proprietary and market-leading vendors to facilitate the complex onboarding processes in Private Banking/Wealth, including application, onboarding workflows, AML, KYC, and regulatory reviews..

Coverage Teams

Custom display where users can associate different individuals to the client to ensure that all roles involved in managing the client are listed, allowing team collaboration and cross-functional transparency.

Interactive selling

Use of Market leading vendors to deliver relevant content, personalize the selling experience and share marketing materials.

BENEFITS

Drive higher employee satisfaction
Building a more digitally-enabled workplace and helps with retaining and attracting talent

Enhance client experience
So clients see wealth and private banking teams as trusted advisors and managers

Accelerate revenue growth and retention
Through more timely and relevant client interactions supported by a 720° customer view and data insights

Drive direct cost savings
Replacing existing front office systems with SalesForce, reducing overall maintenance and licensing costs

Increase advisor/client manager productivity
Creating more client-facing time through reduction of administrative tasks with mobile access of events, notes, and self-serve reporting

CONTACT

Rick Reuter
Principal
Deloitte US
rireuter@deloitte.com

Melwin Correa
Product Owner
Deloitte US
mecorrea@deloitte.com

Cédric Deleuze
Partner
Deloitte Belgium
cdeleuze@deloitte.com

Annelies Saerens
Product Owner
Deloitte Belgium
asaerens@deloitte.com