

# 5 ways to BUILD SALES ADVANTAGE in FINANCIAL SERVICES

The challenges that financial institutions faced during the crisis have proven that resilience is the key to building future advantage. But in this new world of forced agility and 'digital everything,' what's the best way to drive collaborative engagement for your employees and clients?

Start with these five strategies.

## 1 Enable front-middle office visibility and collaboration to ensure business continuity

- Integrate organizational data within a single source of truth
- Extend real-time CRM visibility to non-CRM users
- Unite critical CRM data across multiple Salesforce orgs
- Enable real-time collaboration around live CRM data

Disconnected tools across distribution teams result in disjointed efforts – Only **18%** of asset managers report having technology functions adequately servicing distribution

Integrated data repository results in

**47%**

increase in defined benefit plan and client tenure\*



## 2 Empower employees with real-time engagement and 1:1 coaching, from anywhere.

- Easily track pipeline, deals, and performance at a glance
- Drive alignment around tasks, priorities, and action items
- Capture real-time conversations and data-driven feedback in context
- Deliver personalized 1:1 coaching virtually and on mobile



## 3 Create data-driven account strategies to build trust and drive client retention.

- Act upon real-time customer data and insights
- Maintain 360-degree view of your client and their relationship history
- Deliver personalized guidance and contextual support

Utilizing applications that leverage analytical output to customize engagement with clients results in

**36%**

increase in sales\*



## 4 Simplify and automate CRM processes to accelerate productivity and reduce costs.

- Consolidate business-critical tools and leverage integrated technology
- Standardize and automate best practices in CRM
- Build customizable templates into guided sales processes

**SEQUOIA FINANCIAL GROUP**

**\$400K annual savings and 30 minutes saved daily per employee**

**10-30%**

of asset management firms saw lower costs due to increased process automation and administrative efficiency \*\*



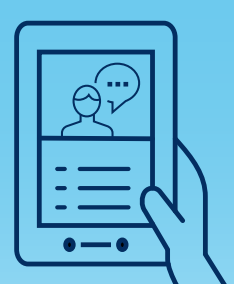
## 5 Strengthen client relationships with real-time digital engagement and collaboration.

- Shift to digital channels to maintain high-touch communication
- Enable real-time client accessibility on mobile
- Deliver personalized interactions from anywhere, at any time

When corporate banking institutions digitize their relationship models, they have the potential to increase revenue by

**15-25%\*\***

\*Casey Quirk - Distribution 2.0, 2019  
\*\* McKinsey & Company - Global Wealth & Asset Management, 2019



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