

POWER
OBJECTS

An HCL Technologies Company



PowerObjects is 100% focused on
Microsoft Dynamics 365. Driving success for your
end-to-end journey with our four pillars of
service, support, education and add-ons.





●●POWER
●●OBJECTS

An HCL Technologies Company

How To Transform The Customer Experience in Financial Services

PowerObjects, Microsoft, Forrester

Agenda

10:00am – 10:05am

Welcome & Presenter Introductions

Greg Moser, PowerObjects

10:05am – 10:25am

The Customer Experience Transformation,
Forrester POV

Kate Leggett, Forrester

10:25am – 10:40am

The Customer Experience Roadmap,
Microsoft POV

10:40am – 10:50am

The Customer Experience Best Practices,
PowerObjects POV

10:50am – 11:00am

Ask The Experts, Questions & Discussion



Our Presenters



Chad Hamblin

Global FSI Industry Director,
Microsoft



Kate Leggett

VP, Principal Analyst,
Forrester



Greg Moser

AVP, Global Financial Services,
PowerObjects

PowerObjects Momentum

- **1,300+** Delivery Resources Globally
- Spanning **11** Countries
- Impacting over **1 Million** users with Dynamics 365
- **25** FSI Go-To-Market Team Members
- Actively supporting **36** FSI customers across Capital Markets, Insurance & Banking

MICROSOFT GLOBAL
PARTNER OF THE YEAR

2019 WINNER

Dynamics 365 for Customer
Service Award

Financial Services Award

"The combination of Dynamics 365, PowerObjects' Capital Markets Customer Experience Data Model, and the Microsoft One Common Data Layer Platform – including LinkedIn – will surely help Capital Markets firms increase customer satisfaction, increase upsell/cross-sell opportunities, and drive down operating costs. And that's how organizations in this channel will survive and prosper in this complex and involving industry."

Hayden Stafford-CVP,
Global Microsoft Business Applications

Our Global Financial Services Expertise



PEOPLE

30000+



SMEs

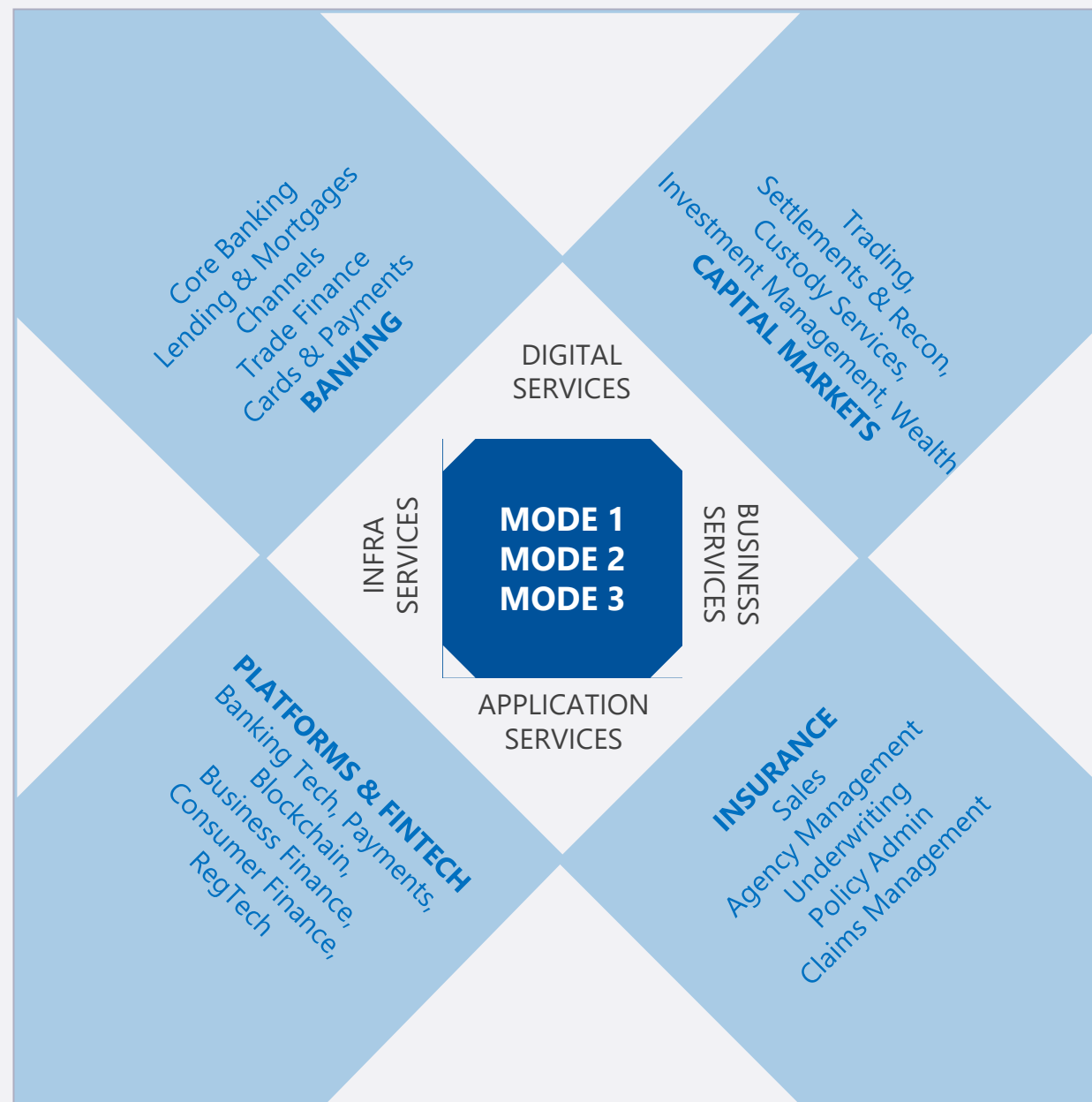
1500+



CUSTOMERS

40+ STRATEGIC
RELATIONSHIPS

INDUSTRY SERVICE PORTFOLIO



EVEREST GLOBAL CAPITAL MARKETS

"Global leader" - 3rd consecutive year

EVEREST GLOBAL BANKING

"Global leader" - 3rd consecutive year

EVEREST GLOBAL INSURANCE

"Global Leader"

IDC APP MODERNIZATION & DIGITAL

"Leader"

GARTNER – INFRASTRUCTURE SERVICES

"Leader"

ISG REPORT ON ADM SERVICES

"Leader"

FOCUS ON DEEP RELATIONSHIPS

5 AMONG TOP 10
GLOBAL INVESTMENT BANKS

7 AMONG TOP 10
LIFE AND P&C INSURANCE
COMPANIES

TOP 2
RETAIL BANKS ACROSS EACH GEO

11 OF TOP 25
FINTECH FIRMS

Deutsche Bank



CREDIT SUISSE

MetLife

AEGON

F50 US BANKING GROUP

Allianz



citi

DNB

STATE STREET



F200 US BASED FSI



FINASTRA



**The Customer & Employee
Experience Transformation!**

Kate's Slides

Survey Question

What Customer Relationship Management (CRM) Solution do you currently have in place today?

- Microsoft Dynamics 365
- Salesforce.com
- Pega Systems
- Siebel
- Home Grown
- Other
- None





The Microsoft Customer Experience Digital Transformation

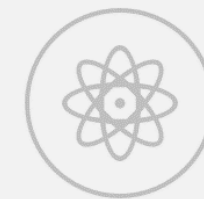
Chad's Slides

Microsoft Business Applications

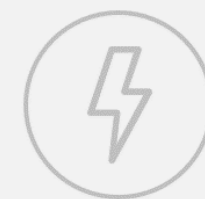


Our FS Practice Capabilities

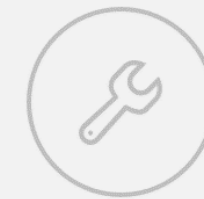
- We support every workload on [Dynamics 365](#)
- 21 [Change Management Consultants](#) – all Prosci certified
- 11 [Centre's of Excellence](#)
- Extensive [PowerPlatform](#) capabilities
- 3x [Solution Accelerators](#) for FSI
- 1,300 [Active](#) Microsoft Dynamics Customers
- 1 [Million](#) Microsoft Dynamics Users



Data



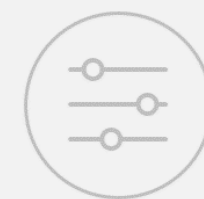
Developer



Field Service



Education



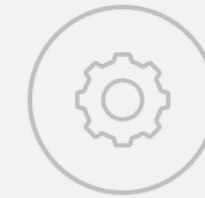
PMO



Call Centre



Program
Mgmt.



Solution
Architect



Business
Analysis



Quality
Assurance



Finance &
Operations

POWER
CAPITAL

POWER
BANKING

POWER
INSURANCE

Guiding Principles

- Always Add Value
 - Think Team
 - Love What You Do
 - Live The Technology
 - Do The Right Thing

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Our Capital Markets Point of View



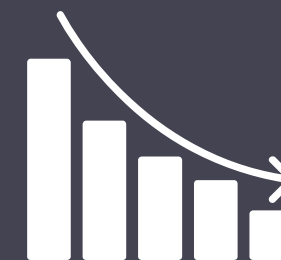
Investment:
Customer
Experience CRM



More Complex
Products – New
Product Types

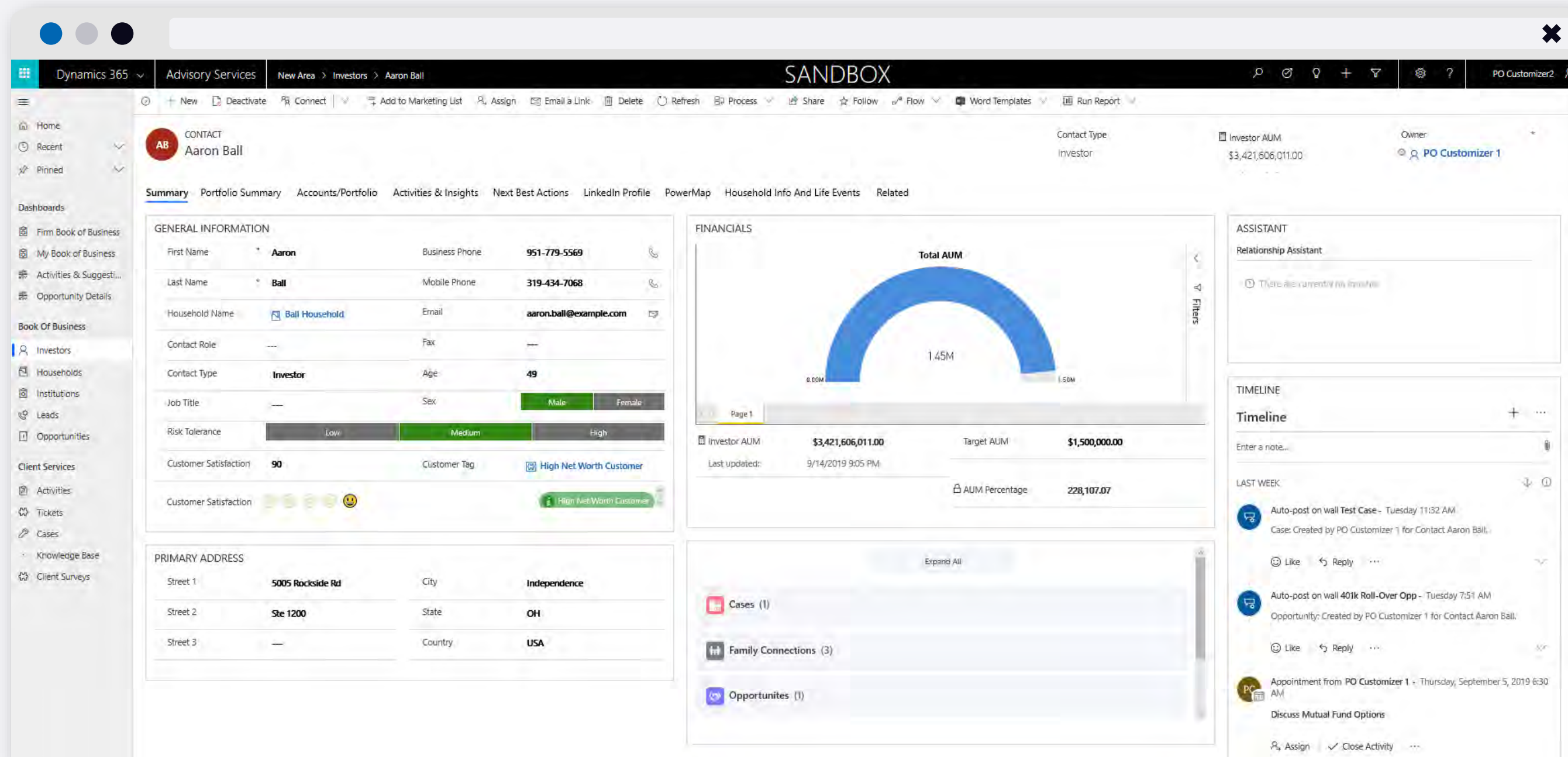


Compliance &
Regulation



Lower Margin &
Tighter Cost
Controls

PowerCapital™ Persona Driven UI



11 Persona Subtypes

- Asset Manager: Institutional
- Asset Manager: Channel
- Asset Manager: Retail
- Managing Broker Dealer
- Registered Investment Advisor
- Wealth Advisor
- Global Consultant
- Financial Institution
- Institutional Client
- Household
- Investor

POWER BANKING

Our Banking Point of View

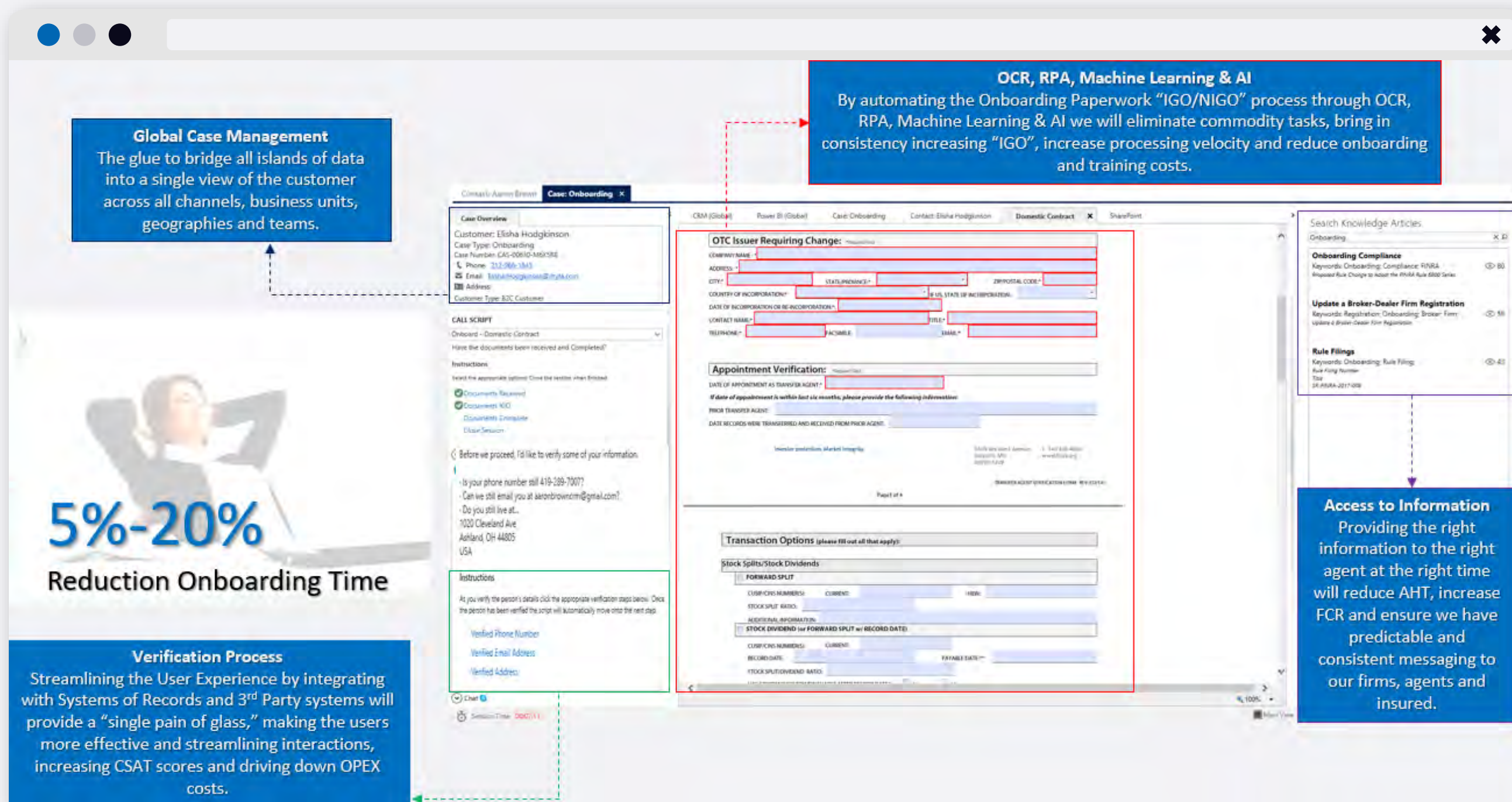
The revenue impact of a 1-point improvement in CX Index™ score results in:

	Annual incremental revenue per customer*	x	Average number of customers per company†	=	Total revenue
 Banks (multichannel)	\$8.19	x	15 million	=	\$123 million
 Banks (direct)	\$9.82	x	3 million	=	\$29 million
 Credit card issuers	\$0.08	x	61 million	=	\$5 million

The assets under management impact of a 1-point improvement in CX Index score results in:

	Annual incremental assets under management‡	x	Average number of customers per company†	=	Total assets under management
 Brokerages (multichannel)	\$622.24	x	31 million	=	\$19 billion
 Brokerages (direct)	\$400.00	x	15 million	=	\$6 billion

Data-Driven & Extensible AI



Global Case Management
The glue to bridge all islands of data into a single view of the customer across all channels, business units, geographies and teams.

5%-20% Reduction Onboarding Time

Verification Process
Streamlining the User Experience by integrating with Systems of Records and 3rd Party systems will provide a "single pain of glass," making the users more effective and streamlining interactions, increasing CSAT scores and driving down OPEX costs.

OCR, RPA, Machine Learning & AI
By automating the Onboarding Paperwork "IGO/NIGO" process through OCR, RPA, Machine Learning & AI we will eliminate commodity tasks, bring in consistency increasing "IGO", increase processing velocity and reduce onboarding and training costs.

Access to Information
Providing the right information to the right agent at the right time will reduce AHT, increase FCR and ensure we have predictable and consistent messaging to our firms, agents and insured.

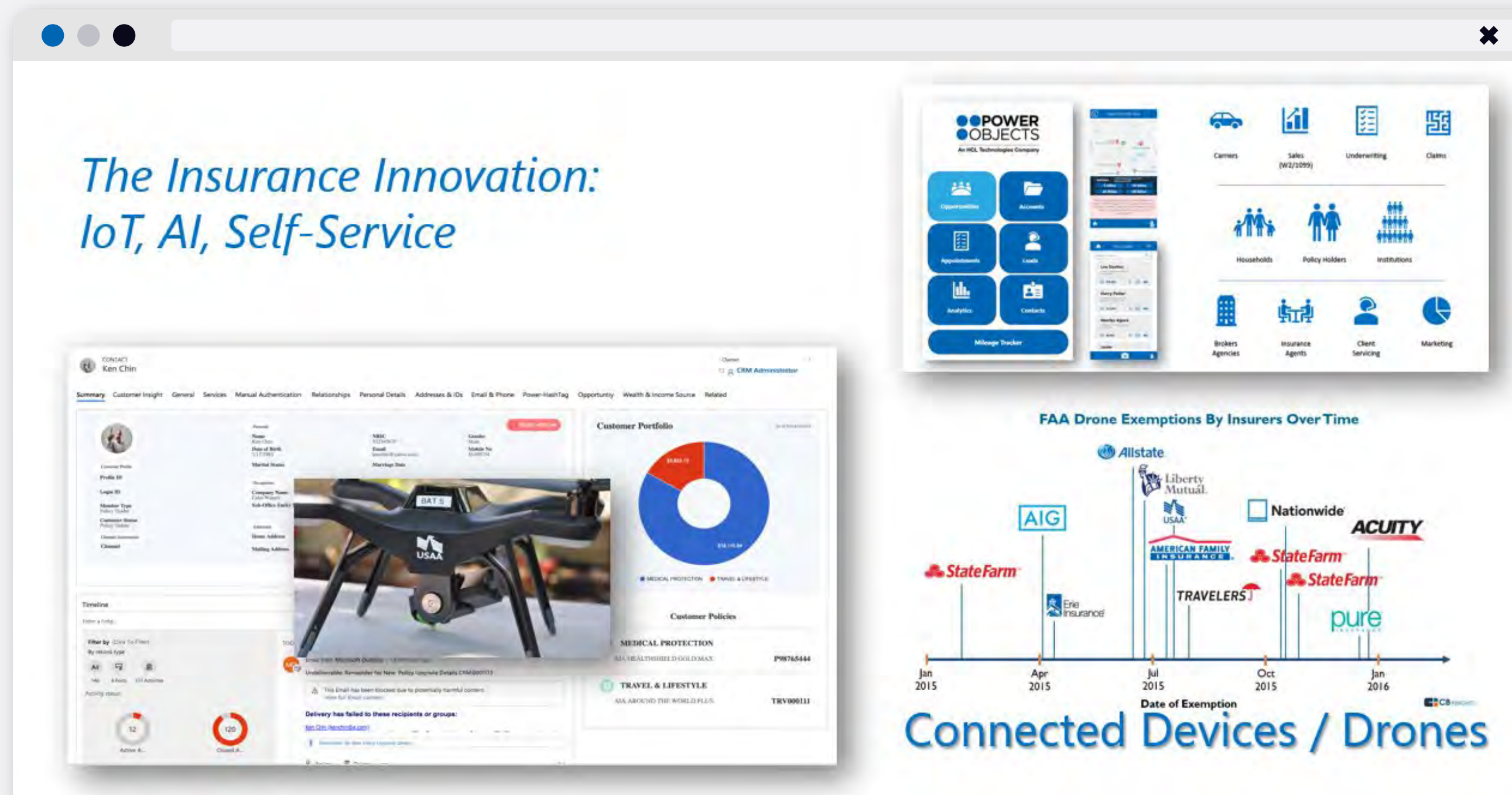
High Performance Service

- Omni-channel Service
- Global Case Management
- Agent Desktop
- Self-Service
- Chat & BOT Framework
- Best Next Action, AI
- Inquiry Type Segmentation
- Application Unification

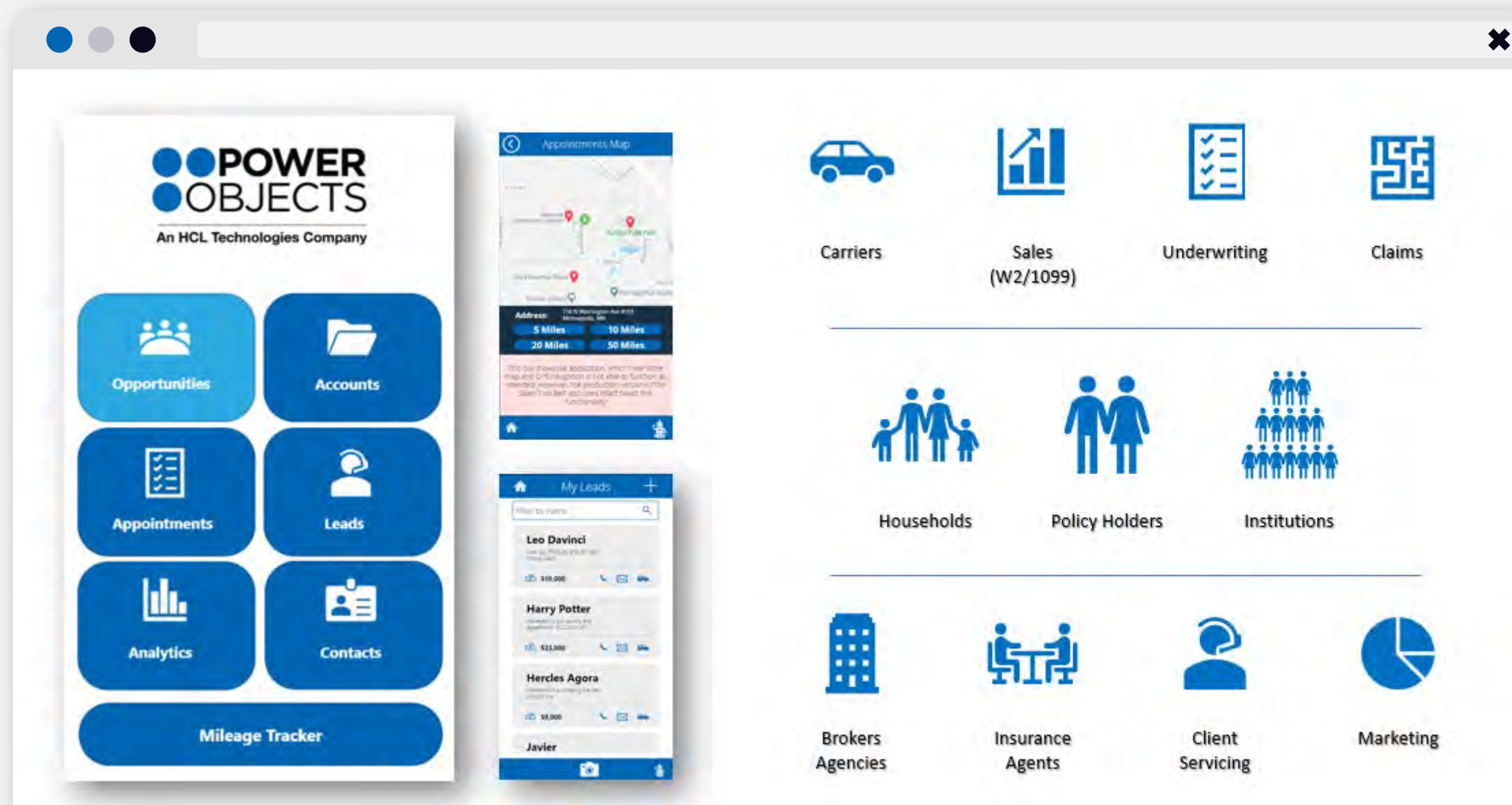
POWER INSURANCE

High Performance Insurance CRM

POWER 
INSURANCE



PowerCapital™ Persona Driven UI



Insurance Empowerment

- Customer/Insured, Household & Institution Management
- Policy, Claims, Investment Management
- Agent (1099/W2), Broker, Carrier Management
- Sales, Marketing, Onboarding, Customer Service, Field Service, Project Service Workloads
- Mobile Empowerment

How To Ensure Success

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BANKING

POWER 
INSURANCE



People

Organizational Alignment & Consensus

Persona Definition – Customer & Employee Journey Definition

Counter-dependencies, Handoffs and Process

Process

Closed Loop Process

80/20 Rule

SMART KPIs

- Specific
- Measurable
- Attainable
- Relevant
- Time bound

Technology

Application Unification

Automated: DevOps, Testing, QA, Acceleration

Closed Loop Architecture

Data

Master Data Management

Data Integrity

Data First Mentality

Survey Question

What is your biggest concern is deploying a High-Performance CRM System for Financial Services?

- Organizational Alignment & Consensus
- Complex Technology Architecture
- Siloed Process, Workflow & Business Units
- Complex Requirements
- Program Budget
- All The Above



Thank You