

Enhancing customer experience for financial sectors



Leverage cloud-based infrastructure to enable
data-driven personalization with HCLTech

Introduction

According to a Gartner survey, 81% of companies compete mostly or completely, on the basis of customer experience. This is what makes it central to all banking and financial institutions. A seamless experience not only impacts customer satisfaction but also improves customer retention. To positively change customer lifetime value, financial institutions must focus on the central theme of invaluable customer experience.



The digital marketing trends in finance

Personal digital assistants and chatbots: 10% of the sales have been influenced by personal digital assistants and chatbots

Personalization along all stages of the sales funnel: 58% of the revenue is attributed to personalized email marketing through different segments

Cognitive and AI-powered customer predictive analytics: 40% of the digital transformation initiatives have been supported by AR/VR/AI cognitive technology

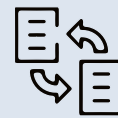
Digital experience and marketing automation platforms: 60% of the organizations have fully articulated a digital platform strategy

Customer engagement through digital channels: 72% of the consumers turn to online and mobile platforms before they start their purchasing journey

Customer expectations from the financial and banking institutions:



Personalized engagement and the need to be catered to individually. They expect an enriched engagement with knowledge-based solutions to their problems



Synchronization of data on their customized dashboard along with tools within the dashboard for upselling. The bank tools should be user-friendly and available on all devices



Many customers want to access **self-service experiences** so that they don't have to be dependent on their banks for everything



Transparency for risk identification and investigation. They also have the need to identify the next conversation across channels

ADvantage Experience: One-stop solution for all your customer needs

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Why ADvantage Experience is the best choice for you

Adds tremendous value to customers

Keeps customers at top priority, thereby impacting customer retention

Makes processes more efficient and optimized

Builds a robust partner ecosystem

Solution highlights

1

DesignOps:

A comprehensive automation framework for digital channels to seamlessly integrate with design systems to help reduce implementation costs and reduce development cycles

2

Onboarding:

Automates the site onboarding, global rollout, and migration of content from legacy platforms to all leading digital management platforms. It assures a faster, cost-efficient, and auditable migration of a site

3

Migration framework:

Automates the platform migration, including content from legacy to Adobe Experience Manager (AEM). It ensures faster, more economical, and more auditable content delivery

4

Xperience AI:

A modular and extensible platform that enables an organization to quickly deploy a dialogue-driven platform to interact with their customers across multiple messaging and virtual assistant channels

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Key use cases

Benefits

Customer
onboarding

**Consistent
brand voice**
across channels

Cross-sell/
Upsell

Engage customers
early with advisors

Enabled
content reuse

Reduced time
to launch
**channel agnostic
microsites** by **60%**

Self Service

Seamless online
and branch
experience

**Data-driven
personalization**

Enabled
analytics-driven
**personalized
marketing
campaigns**

Omnichannel
Campaigns

Targeted
Promotions

Leverages
**cloud-based
scalable**
infrastructure

HCLTech | Supercharging Progress™

HCLTech is a global technology company, home to 219,000+ people across 54 countries, delivering industry-leading capabilities centered around digital, engineering and cloud, powered by a broad portfolio of technology services and products. We work with clients across all major verticals, providing industry solutions for Financial Services, Manufacturing, Life Sciences and Healthcare, Technology and Services, Telecom and Media, Retail and CPG, and Public Services. Consolidated revenues as of 12 months ending September 2022 totaled \$12.1 billion. To learn how we can supercharge progress for you, visit hcltech.com.

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