

Financial Services Providers Need to Go Deeper with Digital

ORACLE

Solution Overview: Oracle CX for Financial Services

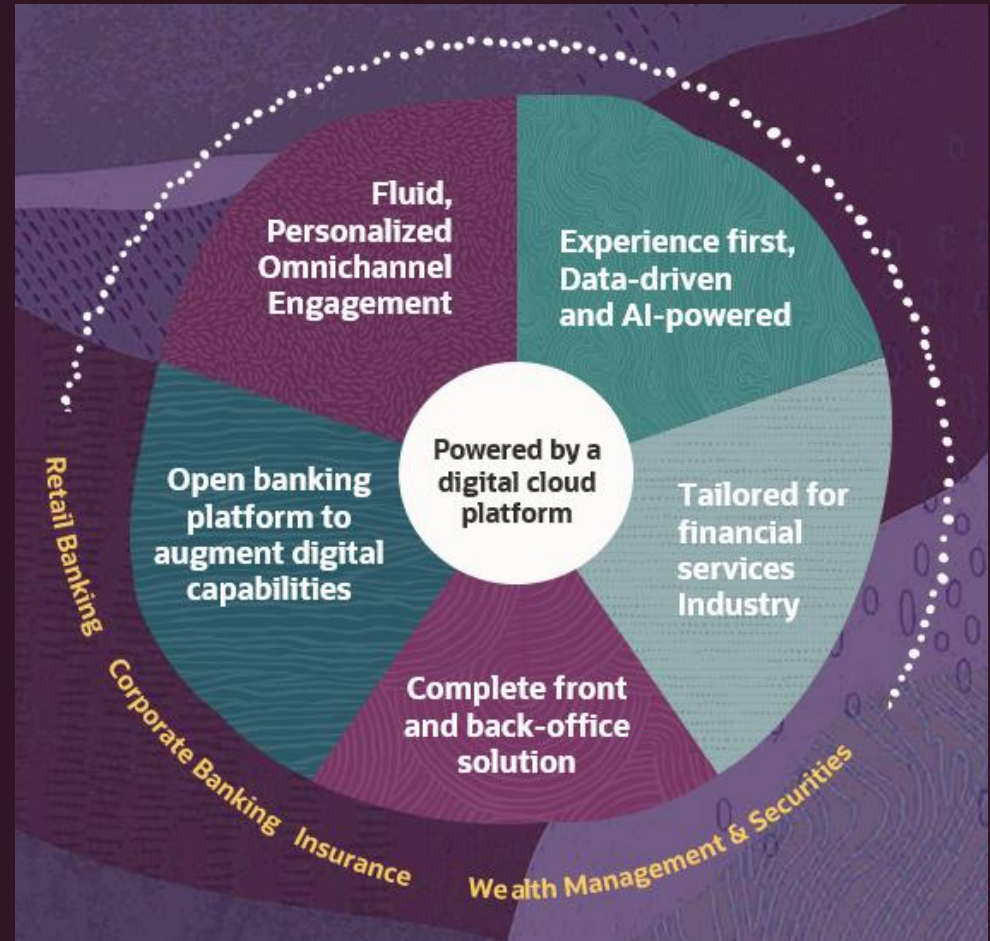
The world has changed and financial services companies need to implement advanced digital capabilities to win.

Connecting and unlocking the value of data in real time to fully understand the customer is the foundation for success in the experience economy. Advanced digital innovation allows financial institutions to go further and anticipate customer needs in the moment, drive efficiency, and increase financial value. Financial services leaders who want to succeed must focus on advanced digital capabilities while delivering a frictionless customer experience in the current landscape.

Solution Overview

Oracle CX for Financial Services is a cloud-based digital customer experience solution tailored to the financial services industry, with SaaS CX solutions for: Retail and Corporate Banking, Insurance, and Wealth Management and Securities.

Oracle offers market-leading CX financial services industry solutions across banking, insurance, and wealth management to deliver an exceptional customer experience and create customer loyalty. Our solution enables a customer-centric, omnichannel approach for managing engagement across key financial processes allowing companies to expand into new business models while addressing your compliance requirements in-context of customer experience.



Financial Services Companies Compete on CX in the Digital Age



Challenges

Customers expect a consistent experience no matter the channel

New players in the space are raising the competitive bar as they reinvent traditional models.

Increasing need to be agile and rapidly innovate with intelligent technologies that deliver advanced digital capabilities

Interest rate reduction, lack of expansion, low GDP/recession environment impacts margins

Solution Benefits

- Oracle offers market-leading CX financial services industry solutions across banking, insurance, and wealth management to deliver an exceptional customer experience and create brand loyalty.
- Oracle helps financial institutions increase and advance customer digital interactions with a frictionless experience, a complete customer view, and improved conversion rates.
- Our solution enables a customer-centric, omnichannel approach for managing engagement across key financial processes allowing you to unify the front and back office applications to drive efficiency and profitability while expanding into new business models while addressing compliancy requirements.
- Oracle offers a unified solution with a cohesive information model delivered on the Oracle Cloud Infrastructure to provides a transformative connected intelligence and experience for customers and employees in omnichannel.
- The open and modular platform enables financial institutions to boost their digital performance in the face of heavy competition and disruption, allowing partnerships with fintechs and strategic integration.

Solution Highlights

Retail Banking

Customer centric digital Banking

Omnichannel engagement

Expanded ecosystem and business models

Corporate Banking

Connected **front and bank office**

Agile **digital process management**

Omnichannel engagement

Insurance Solutions

Intelligent **customer insights**

Integrated industry processes

Omnichannel distribution and engagement

Wealth Management and Securities

Trusted advisory services

Intelligent **client portfolio management**

Integrated origination to onboarding



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