

Fenergo Client Lifecycle Management for Salesforce®

Deliver a better client experience by digitally connecting every client journey



The Challenge

Financial institutions (FIs) are focused on delivering a best-in-class client experience. Yet, many banks are losing market share to digital newcomers who can offer a streamlined, modern onboarding experience.

FIs must gather and validate detailed information about their clients through disconnects across every client touchpoint during the onboarding and subsequent client lifecycle processes. For every disconnect that exists in a client's journey, there is a corresponding reduction in client experience. Additionally, every disconnect between internal stakeholders (relationship managers, client onboarding, KYC specialists etc.) also contributes to a poor employee experience.



Fenergo CLM for Salesforce

Fenergo CLM for Salesforce transforms the client onboarding and client lifecycle management process. The solution combines the strengths of the world's No. 1 Client Relationship Management solution with the advanced capabilities of the No. 1 Client Lifecycle Management solution. It digitalizes the entire lifecycle process, becoming the steel thread that digitally connects every client journey in the client lifecycle process – from prospecting to client onboarding to ongoing KYC reviews. An enterprise-wide, single client view ensures clean, centralized and accurate data and documents throughout the product and client lifecycle. This enables front, middle and back-office teams' access to the same information and records, minimizing and streamlining the client touchpoints and allowing your teams to focus on high value-add activities.

Fenergo's solution is built on two core principles – no-code configuration and API-first connectivity – which provide our clients with the flexibility and confidence to grow and manage their business

Fenergo CLM for Salesforce delivers:

Digital End-to-End Orchestration



Fenergo CLM for Salesforce delivers a truly frictionless and digital client journey from prospecting to onboarding and lifecycle processes. The solution puts Relationship Managers in the driving seat of a new banking relationship, empowering them to search for existing entities and initiate and track new clients and product onboarding directly from their Salesforce screen.

Centralized Entity Data & Document Management



Fenergo CLM for Salesforce enables FIs to digitally acquire, store and share client information, not only just between Salesforce and Fenergo, but also across multiple business lines and jurisdictions (data laws permitting). Fenergo integrates with a host of external data providers and internal data repositories, acting as a centralized repository of data and documentation, providing a 360° single client view, reducing siloes and enabling informed business decisioning.

Seamless Client Outreach

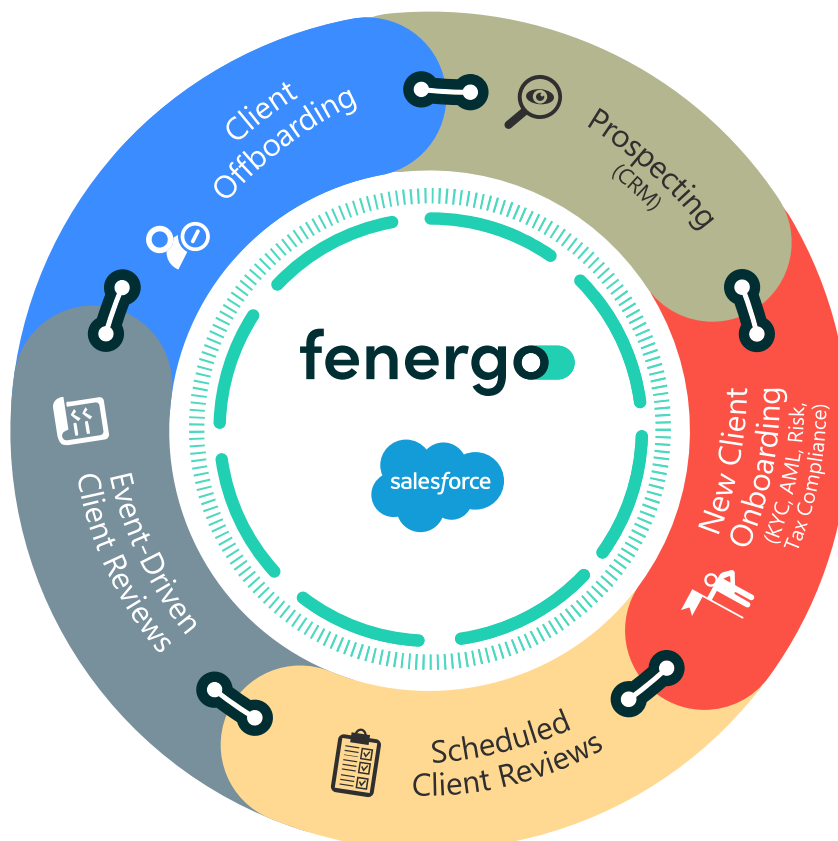


For any outstanding documentation, the Relationship Manager can perform client outreach directly, easily and efficiently uploading client documentation. The solution delivers a best-in-class digital client outreach experience via the Fenergo client portal, digital ID&V and e-Signature capabilities. Beneficial owners and authorized signers can also be added to the client outreach process for seamless digital verification and expedited onboarding.

Real-Time Visibility



Fenergo CLM for Salesforce digitally connects every stakeholder in the sales, client onboarding and KYC process. As the client onboarding journey progresses in Fenergo, the Relationship Manager has real-time visibility over the end-to-end process directly from Salesforce and can receive automatic updates via chatter notifications.



Fenergo CLM helps Financial Institutions to:

○ Transform Client Experience

Digitally transform the client experience through rapid onboarding with fewer touchpoints. A reduction in system hand-offs and duplication of data means teams are more organized around completing high-value work tailored to the client's needs.

○ Achieve Greater Operational Efficiencies

Transform operations by reducing offline, fragmented or duplicated outreach and unifying client data into a central repository. Introduce the ability to track, manage and audit the book of work for all teams, releasing resources to focus more on high value-add activities.

○ Reduce Total Cost of Ownership

Fenergo CLM for Salesforce reduces the costs of managing and maintaining your technology infrastructure and "cost to change" budget, reducing application, support and configuration (no-code config) costs.

○ Unlock Revenue Potential with Existing and New Clients

With a centralized CRM and CLM solution, you can deliver an improved client experience, successfully identify cross-sell and up-sell opportunities to existing clients, manage associated risk and attract new business with a greater competitive advantage



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Request a demo

www.fenergo.com/clm-for-salesforce discover@fenergo.com

