Cloud Concept

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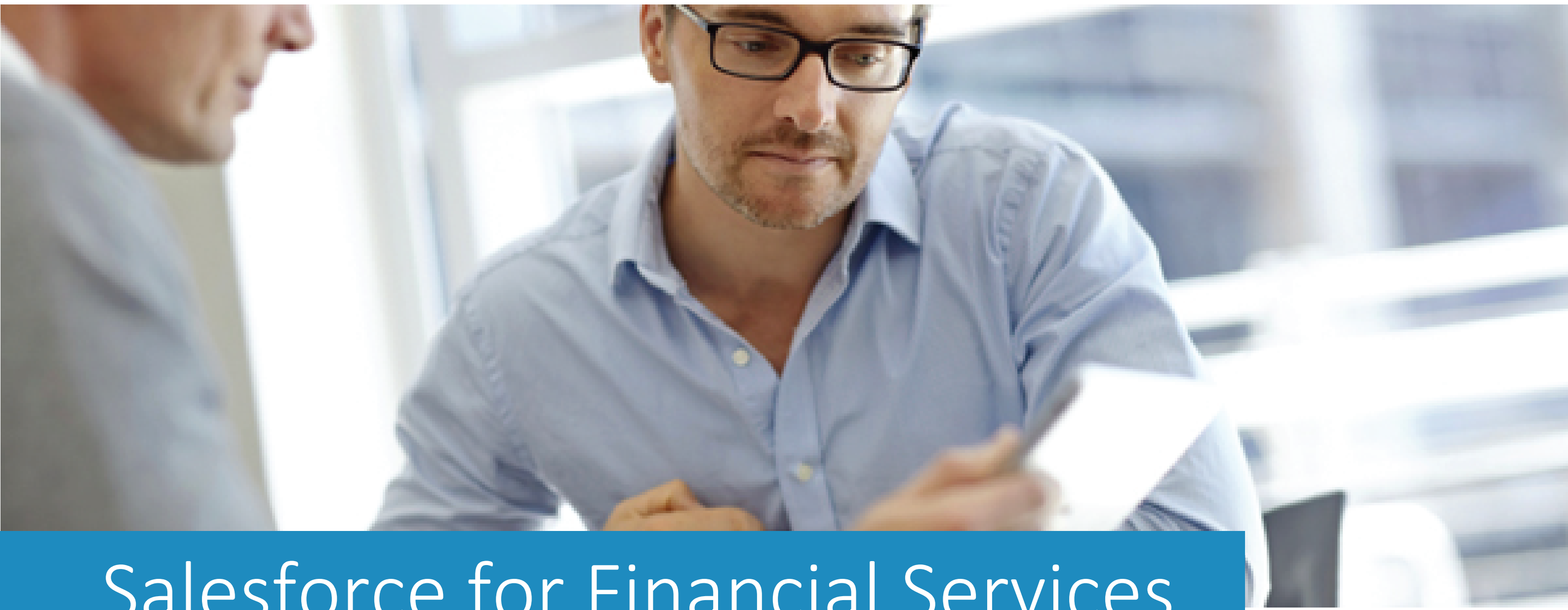

Salesforce for Financial Services

Investors and clients today are mobile, social, and connected. They expect responsive 1-to-1 relationships. With 55% of Investors saying they want to collaborate with their Financial Advisors, the dynamic is changing. Salesforce for Financial Services has the powerful tools you need to stay connected with clients in realtime, nurture deeper relationships, and take your productivity, and business growth to the next level.

Cloud Concept is the leader in offering the first Salesforce for Financial Services customized for the GCC, built on the world's #1 CRM platform, Salesforce.com. Empower your team to connect with their clients in a whole new way.

Benefits

- Secure & fully branded portal for your clients
- 1-to-1 client relationship management
- In depth analytics to support decision making
- Multi device compatible
- Efficient process management
- Seamless integration with your existing infrastructure system

Salesforce for Financial Services is available as a complete solution or on a per-module basis.

Modules of Salesforce for Financial Services

Core CRM

Create rich investor profiles centered around personal goals, family needs and pivotal life events. Access alerts, assign tasks and collaborate with team members all from the Salesforce platform. Then nurture deeper relationships by staying in touch with proactive tracking and event alerts that remind you to reach out when clients need you most.

- Full client profile and classification by networth and other attributes
- Oneclick document generation, like onboarding forms
- Activity management and email tracking fully sychronized with Outlook
- Rich, realtime reports and dashboards
- Automated notifications for birthdays and key events

Wealth Management

Maintain a strong relationship with high-net-worth clients with 360-degree views of their financials and interests. Keep track of client interactions and wealth managers' activities and performance in real time.

- Keep track of client interests and exclusions
- Full view of client holdings and portfolios
- Match clients interests against available investment opportunities
- Generate portfolio statements automatically

Distribution

Whether it's capital raising, sale of securities, or other mandates, run your distribution business efficiently including roadshows, investors, and clients. Never miss your targets with the right tools for managing, tracking, and measuring the progress of your distribution activities in real time.

- Track investor profiles, interests, and exclusions
- Collaborate on roadshows, capital-raising, and distribution mandates
- Track targets and commitments

Compliance

Stay compliant with full KYC information and validity, including detailed information yearly or more frequently. Speed the approvals of new and existing clients with automated approvals and workflows.

- KYC submission, approval, and renewal
- Cross-check clients against FACTA and World-Check databases
- Full audit trail on all user activity and data

Operations

Maintain control of your operations by capturing, assigning, and tracking client requests to the appropriate departments. Ensure high service quality by setting service-level targets at every step of the process for each type of request.

- Capture and assign client requests to buy, sell, fund, withdraw, etc.
- Track step-by-step actions based on internal and external SLAs
- Send automatic notifications to clients

Customer Mobile App

Extend your reach to clients on the go with your branded client mobile app. Empower your clients to place and track their requests, maintain their profiles up-to-date, access important information, and much more.

- Fully native for iOS and Android
- Fully branded, bearing your own logo and app store listing
- Secure and reliable

Client Portal

Turn your website into a fully functional extension of your front office with your own client portal, complete with requests, client profile, research reports, and much more.

- Secure client access using the same credentials as the mobile app
- Accessible from anywhere at anytime
- Fully branded and customized

ADS SECURITIES

"Salesforce provides us with immediate scalability and flexibility, with Cloud Concept being our partner of choice for implementation and customisation."

Ahmad Al-Jebouri,
Operations Director, ADS Securities.

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