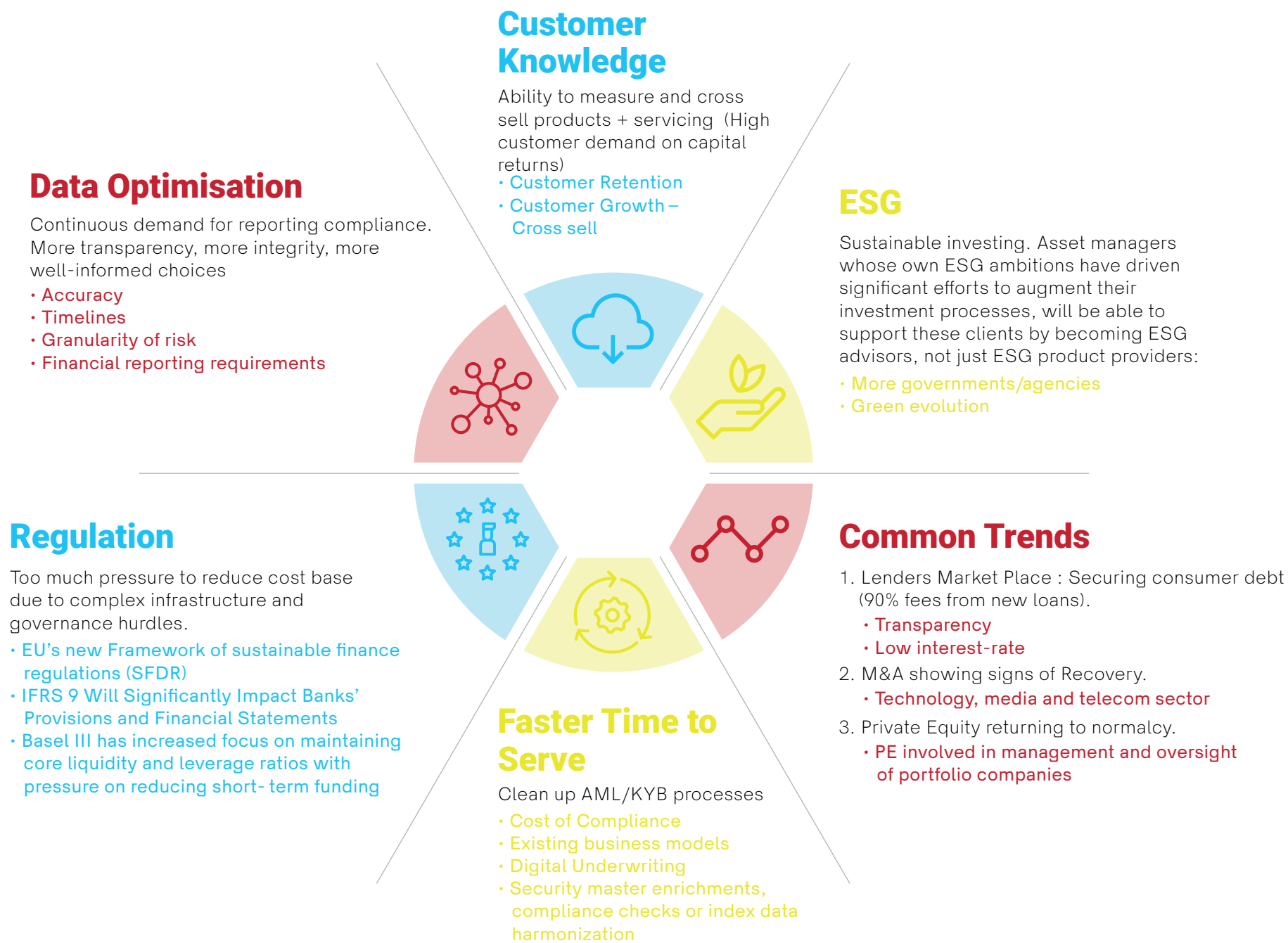


## Industry Challenges

### Sustainability and Use of Technology



## VASS Approach

### The Build Gap

#### What the problem is...

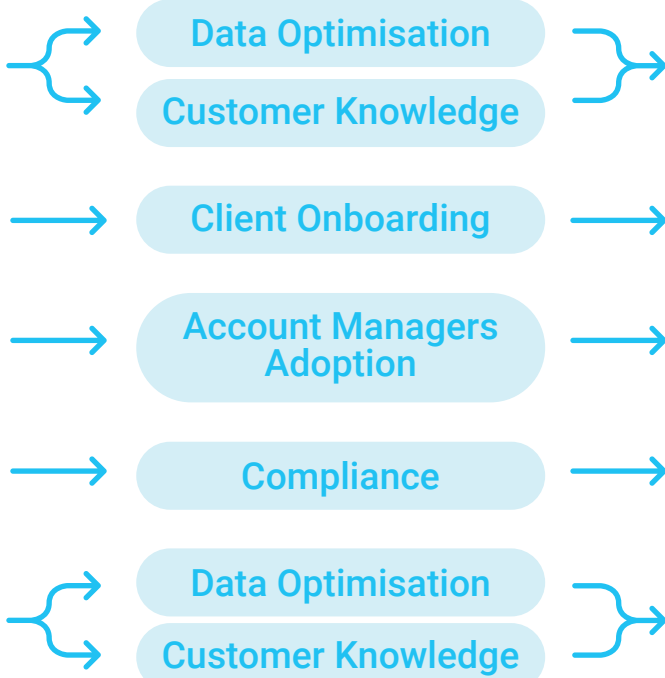
Unable to have one single source of truth of the customer. Improve customer recurrency + retention

Customer Adoption. Onboarding Acquisition + Business Growth

Ease of use for Daily users, getting greater business benefit from Salesforce. Motivational rather than Reporting

Lack of Unified Sales Process, Record Keeping & Engagement History

Unable to have and 2e2 process from research to- lead management – opp management – deal execution & servicing



#### Solution Requirement

360° View. Lack of Connected data within Salesforce. Salesforce use as a reporting tool. Live Data + Cross sell

Omnichannel Digital onboarding. Underwriting automation. Speed to serve. Customer Experience

Getting users to run their customers from Salesforce utilizing data touch points like activities & Action Plans (360)+ Automation + Nurturing

Action Plans, Dashboards, Task's orchestration, Collaboration Record Keeping. Efficiency.

Lead & Customer 360° view. Historical Track. All stakeholders fully involved on a customer centric strategy from Financial Advisors, M&A and Research roles.