Industry Challenges
Sustainability and Use of Technology

Data Optimisation
Continuous demand for reporting compliance. More transparency, more integrity, more well-informed choices
- Accuracy
- Timelines
- Granularity of risk
- Financial reporting requirements

Customer Knowledge
Ability to measure and cross sell products + servicing (High customer demand on capital returns)
- Customer Retention
- Customer Growth – Cross sell

ESG
Sustainable investing. Asset managers whose own ESG ambitions have driven significant efforts to augment their investment processes, will be able to support these clients by becoming ESG advisors, not just ESG product providers:
- More governments/agencies
- Green evolution

Regulation
Too much pressure to reduce cost base due to complex infrastructure and governance hurdles.
- EU’s new Framework of sustainable finance regulations (SFDR)
- IFRS 9 Will Significantly Impact Banks’ Provisions and Financial Statements
- Basel III has increased focus on maintaining core liquidity and leverage ratios with pressure on reducing short-term funding

Faster Time to Serve
Clean up AML/KYB processes
- Cost of Compliance
- Existing business models
- Digital Underwriting
- Security master enrichments, compliance checks or index data harmonization

Common Trends
1. Lenders Market Place: Securing consumer debt (90% fees from new loans).
   - Transparency
   - Low interest-rate
2. M&A showing signs of Recovery.
   - Technology, media and telecom sector
3. Private Equity returning to normalcy.
   - PE involved in management and oversight of portfolio companies

Data Optimisation
Continuous demand for reporting compliance. More transparency, more integrity, more well-informed choices
- Accuracy
- Timelines
- Granularity of risk
- Financial reporting requirements

Customer Knowledge
Ability to measure and cross sell products + servicing (High customer demand on capital returns)
- Customer Retention
- Customer Growth – Cross sell

ESG
Sustainable investing. Asset managers whose own ESG ambitions have driven significant efforts to augment their investment processes, will be able to support these clients by becoming ESG advisors, not just ESG product providers:
- More governments/agencies
- Green evolution

Regulation
Too much pressure to reduce cost base due to complex infrastructure and governance hurdles.
- EU’s new Framework of sustainable finance regulations (SFDR)
- IFRS 9 Will Significantly Impact Banks’ Provisions and Financial Statements
- Basel III has increased focus on maintaining core liquidity and leverage ratios with pressure on reducing short-term funding

Faster Time to Serve
Clean up AML/KYB processes
- Cost of Compliance
- Existing business models
- Digital Underwriting
- Security master enrichments, compliance checks or index data harmonization

Common Trends
1. Lenders Market Place: Securing consumer debt (90% fees from new loans).
   - Transparency
   - Low interest-rate
2. M&A showing signs of Recovery.
   - Technology, media and telecom sector
3. Private Equity returning to normalcy.
   - PE involved in management and oversight of portfolio companies

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