

Quick Overview

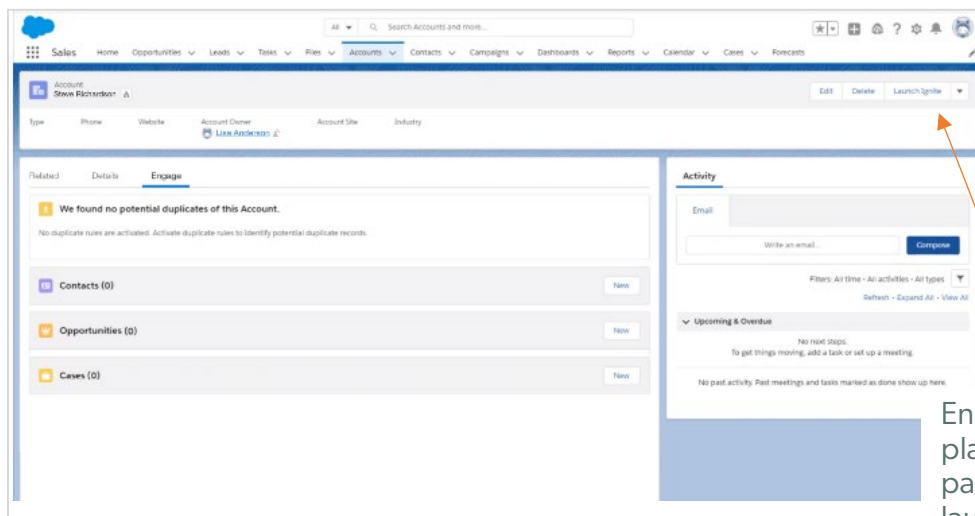
Ignite EngageHUB offers financial institutions a managed package to engage with customers and prospects using the financial institutions current installation of Salesforce.com. It provides an embedded user experience within Salesforce to drive relevant, compliant, and engaging conversations with a ML driven sales engagement directly within Salesforce. Customers and prospects are guided to the right products that meet their needs. All products recommended, uncovered and opened are captured within each opportunity and account automatically.

Step 1: Install the managed package

Step 2: Set up the managed package to connect your Ignite environment (Purchased separately)

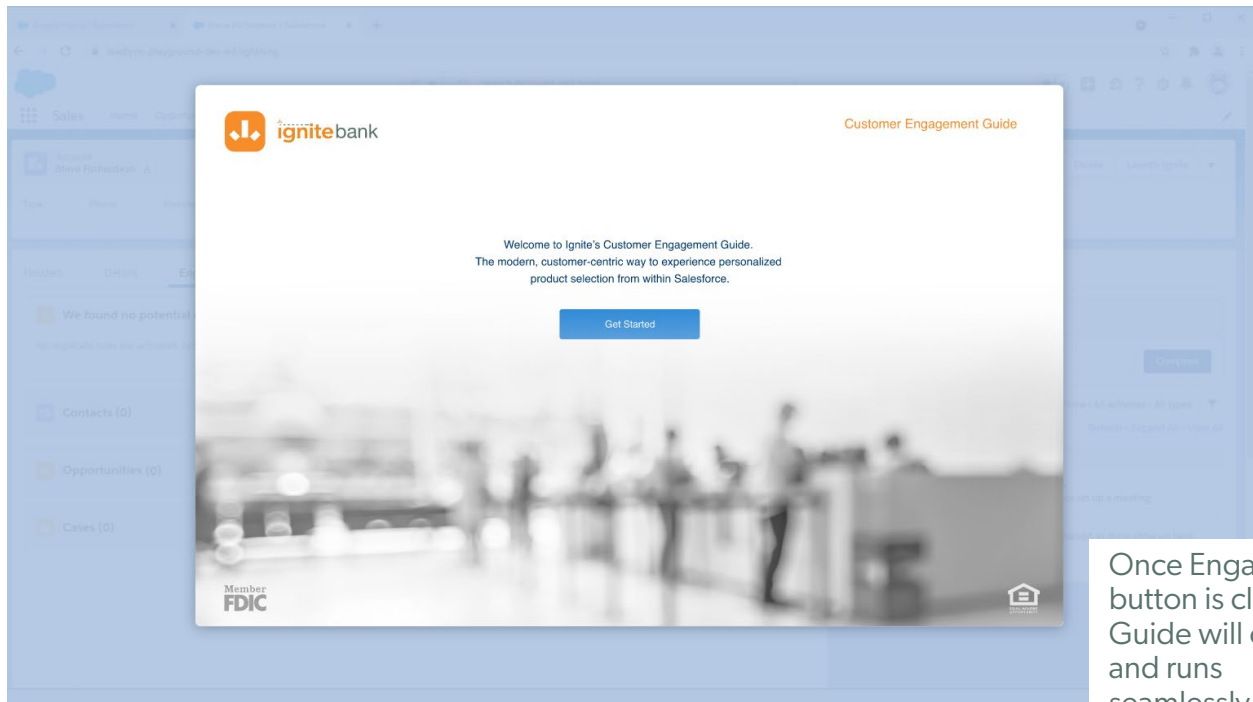
Step 3: Configure each of your Ignite Guides in Salesforce.

Step 4: Customize your Salesforce Layout for Ignite

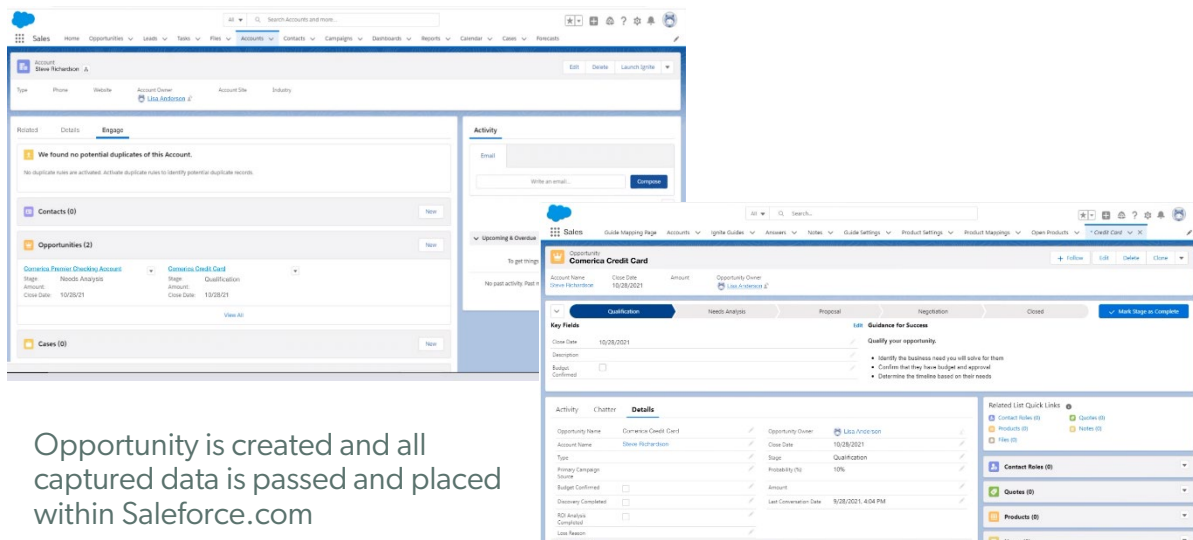


Engage button is placed on Salesforce page for ease of launching a guide with a client or prospect.

EngageHUB Banker/Customer Journey



Once Engage button is clicked Guide will open and runs seamlessly within banks Salesforce.com



Opportunity is created and all captured data is passed and placed within Salesforce.com