



FACT SHEET APEXON & SALESFORCE

SALESFORCE FINANCIAL SERVICES CLOUD



salesforce

Whether you're in wealth management, retail banking, or insurance, Financial Services Cloud has industry-specific features to transform customer engagement

Financial services firms aren't competing just with each other on customer experience, they're competing with the standards set by Amazon, Google and others. A seamless, personalized experience is necessary to win peoples' business.

As a Salesforce implementation partner, Apexon can help you go from transactional to trusted with Financial Services Cloud (FSC).



Leveraging the power of FSC, Apexon provides banking, wealth management and insurance clients with

- A 360-degree view of their customers and enable consistent
- Concierge-level service with the personalized, proactive approach clients expect
- Holistic, goal-based advice that puts their clients at the center of everything they do

TARGET AUDIENCE

Apexon has an approach to address the needs of customers new to Salesforce and existing Salesforce customers looking to migrate to FSC.

LOOKING TO SOLVE COMMON BUSINESS CHALLENGES



Identify customer product white space



View customers in 360-degrees across the household



Proactively manage referrals



Deliver superior customer experience



Manage and achieve customer life goals



Detect money laundering through engagement touch points



Automate fraud detection using AI



Simplify business processes

MIGRATING FROM SALES / SERVICE CLOUD TO FSC



Tap into core Financial Services Cloud features to replace custom built functionality



Extend Salesforce to support business functions now supported by FSC



Expand the use of Salesforce to other lines of business

DELIVERABLES



Reduced Complexity & Risk

Waiting to migrate to FSC increases migration costs and keeps businesses from realizing the benefits and maintenance cost savings of FSC



Greater Innovation

Salesforce invests in multi-dimensional innovation to support the many needs of Financial Services businesses



Decreased Time to Value

Solve common business challenges and deliver value quickly with less risk



Apexon is a pure-play digital engineering services firm focused on helping companies accelerate their digital initiatives from strategy and planning through execution. We leverage deep technical expertise, Agile methodologies and data-driven intelligence to modernize systems of engagement and simplify human/tech interaction.

We deliver custom solutions that meet customers' technology needs wherever they are in their digital lifecycle. Backed by Goldman Sachs and Everstone Capital, Apexon works with both large enterprises and emerging innovators – putting digital to work to enable new products and business models, engage with customers in new ways, and create sustainable competitive differentiation.

 info@apexon.com

 www.apexon.com

FEELING SOCIAL?

