

Industry Insider

FINANCIAL SERVICES



See how our partner Box tackles challenges in the financial services industry. From big-picture problems, to the specific needs of an IT decision maker, Box has it covered.

Box for Salesforce provides one secure platform for the entire content journey. Collaborate with anyone, anywhere, and protect your content with cloud-native security, intelligent governance, and comprehensive compliance.

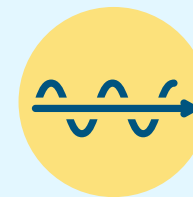


Here's how Box for Salesforce can help a financial services organization like yours.



Improve internal and external collaboration.

Empower your Salesforce users to collaborate securely with colleagues and customers – regardless of file size – no matter what software or device they're using.



Simplify everyday tasks.

Streamline new account openings, insurance claim filings, client service, and more by storing all of your content where your teams are already working.



Maintain security and control over your content.

Your organization's most valuable asset – your content – is protected and available in Salesforce with precision control over how users access, share, and collaborate.



Keep reading to learn how Box could help an IT decision maker simplify processes across the business and deliver personalized customer experiences while keeping content secure and compliant.

The Solution

Box for Salesforce makes it easy for your teams to securely access and edit files, sign documents, and collaborate with internal colleagues and external partners and customers.

Client Onboarding

The Challenge: In-person account opening processes make it challenging for firms to onboard new clients quickly.

The Solution: Box streamlines client onboarding by enabling clients and internal teams to securely share and access confidential information, assign tasks, sign documents, and edit content from any device, anywhere.



Virtual Deal Rooms

The Challenge: Complicated deal room setups result in delays in deals, confusing bidder/third-party experiences, and risk of sensitive data exposure due to the lack of audit logs.

The Solution: Box can create a centralized, secure, and compliant virtual data room for sell side and buy side deal transactions like M&A activities, private equity, and contract negotiations.



Claims Management

The Challenge: Customers and agents need to share videos, images, data feeds, and other associated documents related to a claim. A fragmented experience can put sensitive information at risk.

The Solution: Box helps shorten the insurance claims lifecycle and simplify claim management by centralizing client and agent data in one place.



Digital Client Experience

The Challenge: Clients expect a consumer experience when working with their financial institution. When their expectations aren't met, it can cost business and lead to a poor brand reputation.

The Solution: With Box, you can drive seamless multiparty collaboration by providing clients and financial advisors with a more effective and interactive way to work with a rich set of APIs to create tailored digital experiences.



The Scenario

In this example, let's imagine how an IT decision maker at a bank uses the Box for Salesforce app to simplify processes while keeping content secure and compliant with industry regulations.

Telulah Technology

IT Decision Maker, Happy Bank



Telulah needs to keep up with customer expectations for personalized and engaged experiences, while also enabling teams to be more productive and work from anywhere.

Her Goals:

- Simplify processes within the firm such as client onboarding, new account openings, and loan origination
- Create a seamless digital customer experience
- Ensure content is secure and compliant with industry regulations

Her Challenges:

- Rising customer expectations for digital experiences
- Teams working remotely
- Increasing cybersecurity risk

How Box for Salesforce Solves Telulah's Challenges

Attract new customers with transparent client onboarding.

Box helps Telulah enable clients and internal teams to securely share and access confidential information anywhere.

Streamline the loan origination process.

With Box, Telulah is able to centralize client and advisor data in one secure place to simplify loan intake, processing, and archiving.

Create a centralized, secure, and compliant virtual data room.

Telulah uses Box to protect bidder privacy and business reputation by preventing unauthorized access to documents and other information about competing parties.

Build loyalty with easy online experiences.

Box has helped Telulah improve customer communication by integrating directly with Salesforce and other productivity tools, providing one single platform to access, edit, and share documents.

[Learn more about Box](#)