



Augmented digital customer experience with revamped client portal for a leading US Bank



Ambition

Client is one of the largest banks in US and Canada providing over 27.5 million customers worldwide, a full range of financial products and services.

End customers of the bank maintained multiple login credentials to access their accounts on several bank's websites, resulting in a fragmented, unsatisfactory digital experience. The bank aimed to improve the end customer experience by having a single sign-on solution.

Ambitions Realized

The multiple logins maintained by the bank for wealth customers was replaced by single sign-on authentication. 42,000 customers benefitted with targeted 50% adoption achieved in the first six months. Bank achieved ease of access for their customers of the retail and wealth accounts in one place from the client's website compatible with multiple devices.

End customers benefitted by being able to view and monitor their financial goals, and access the insights published by the bank. The unified view enabled wealth customers to view annuities and insurance together for the first time on client's site. Single view of all related information at a single place elevated self-service abilities of customers who were spending ~18 minutes on the wealth portal on an average. Customers and bank advisors can share documents using the special 'Task' feature, avoiding the registration process on bank's secure email. This was one of Wipro's first of many initiatives where team built APIs on Mulesoft platform to integrate with client systems.

The bank achieved a single view of their retail and wealth customers. The system can identify potential wealth customers using the bank's pre-defined criteria, leading to qualified lead generation for the wealth business. 1.5 million records were sent to client's internal systems for processing to drive wealth leads and insights leading to the bank receiving 2800 wealth banking requests in FY 2024

Action

Wipro's solution integrated with multiple systems, and data was aggregated within Salesforce financial services cloud, providing foundational data for end customers and bank's financial accounts. API- first technology strategy provided real time and quality data from custodians such as Pershing, Client Core Banking, MoneyGuide Pro to view health meter for financial plans.

Single sign on solution was implemented to allow seamless access to custodian sites – NetxInvestor (Pershing Advisory), Client Point (Trust), Money Guide Pro (Financial Plans).

Over 40+ visual designs were created by client DCX team aligning with client brand guidelines as an extension of Client's website

End customer communication emails were integrated with bank's customer compliance monitoring system for regulatory purposes.

Provided out of the box task collaboration and document sharing solution from Salesforce which integrated with the client's unified messaging platform.

Content management solution and workflows were provided to allow for publishing insights to bank's advisors.



Ambitions Realized.

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