



Financial Services Checklist

Ensure both flexibility and compliance while taking care of customers

A FULLY INTEGRATED CLOUD COMMUNICATIONS PLATFORM ALLOWS YOUR EMPLOYEES TO SERVE CUSTOMERS FROM WHEREVER, WHILE ALSO SUPPORTING YOUR COMPLIANCE AND SECURITY NEEDS:

- Help customers help themselves with basic needs, like checking an account balance, and free customer service agents to spend time on more complex customer needs.
- Customers always see your business phone number whether your employees are connecting with them from home, via mobile phone, or from the office.
- Your service reps can get real-time customer insights for quick context, helping them deliver more informed responses that shorten times to resolution.
- Audits are manageable when your cloud services provider has security and privacy controls that address FINRA, GDPR, SOC2, Sarbanes-Oxley, and more.



ONE COMMUNICATIONS PLATFORM - ONE LOW MONTHLY RATE
PHONE | VIDEO | CHAT | CONTACT CENTER | FILES | EMAIL

COMMON ISSUES FACING THE FINANCIAL SERVICES INDUSTRY

- With credit union and mortgage brokers seeking to improve customer satisfaction scores¹, your communications technology needs to empower service reps to deliver quick, high-value customer service as well as help tech-savvy millennials help themselves.
- Pandemic-driven hybrid work models have accelerated digital transformation and require communications and collaborations technology that supports working from wherever—and customer contact from wherever.
- Regular audits and risk management require providers to support compliance requirements.
- The cost efficiency of cloud communications is causing many in the industry to switch out legacy phone systems.

OUR SOLUTIONS CAN HELP SOLVE THESE ISSUES

| | YOUR NEEDS | OUR SOLUTIONS |
|--------------------------------------|--|---|
| DELIVER SUPERIOR CUSTOMER EXPERIENCE | <ul style="list-style-type: none"> <input type="checkbox"/> Seamless client communications and customer-centric channels <input type="checkbox"/> Ensuring customer needs are met quickly by the right resource or service rep <input type="checkbox"/> Accommodate customers who are digitally native and expect more <input type="checkbox"/> Make sure customers don't have to repeat themselves each time they contact you about a single issue <input type="checkbox"/> Extend reach and facilitate faster response times for client inquiries | <ul style="list-style-type: none"> ✓ Elevate integrates voice, chat, and video conferencing interactions on one platform ✓ With Elevate Contact Center, you can easily customize call flow to assign the right agent at the right time, and QA features deliver exceptional results ✓ Turn your customer service capability into an outreach powerhouse with dynamic notifications ✓ Contact Center's real-time insights get service reps into context quickly, helping to deliver more informed responses that shorten times to resolution. Plus, deep historical reporting helps improve future interactions. ✓ Contact Center dynamic notifications proactively send reminders or any communication while respecting the client's preferences |
| MOBILITY AND FLEXIBILITY | <ul style="list-style-type: none"> <input type="checkbox"/> Ensure employees can be productive whether they work at home, in the office, while commuting, or some mix of locations <input type="checkbox"/> Give customers a seamless and consistent communications experience across channels and over time <input type="checkbox"/> Allow video conferencing participants to join meetings from wherever <input type="checkbox"/> Ensure customers receive a consistent experience <input type="checkbox"/> Accommodate distributed service rep teams and multiple branch locations | <ul style="list-style-type: none"> ✓ As a tightly integrated platform, Elevate ensures consistent communications regardless of where your employees are ✓ Chat and SMS automatically synchronize across mobile & desktop apps, and real-time customer insights speed service rep-customer interactions ✓ Elevate lets meeting participants join from mobile phones, desktops, laptops ✓ Voice, chat, and email queues combine into a single omnichannel experience ✓ Anytime, anywhere communications from any device |

1. https://www.theacsi.org/index.php?option=com_content&view=article&id=149&catid=&Itemid=214&i=Credit+Unions

| | YOUR NEEDS | OUR SOLUTIONS |
|--|--|--|
| SECURE CLIENT COMMUNICATIONS AND INDUSTRY COMPLIANCE | <input type="checkbox"/> Manage risk by ensuring cloud service providers are independently audited | ✓ Elevate is SOC 2 audited, which attests to our high security standards—for our products, networks, infrastructure, and privacy protection |
| | <input type="checkbox"/> Protect or encrypt confidential client correspondence, files, text messages, voicemails, and email | ✓ Emails, files, video conference recordings, and more can be secured at rest and while in transit |
| | <input type="checkbox"/> Share documents securely | ✓ Account-level encryption keys secure stored documents, and SSL/TLS secures them as you share them |
| | <input type="checkbox"/> Choose cloud service providers with high uptime SLAs | ✓ Our cloud is purpose-built for 99.999% uptime with a financially backed SLA |
| | <input type="checkbox"/> Ease the audit process with configurable file retention policies, long-term storage, and by enabling access to archives by specific roles | ✓ Elevate offers secure, low-cost, and long-term storage with support for and indexing of relevant data types and formats and role-based permissions for accessing archives |
| | <input type="checkbox"/> Avoid use of and protect disclosure of employee mobile phone numbers | ✓ Callers see your business phone number, whether employees are engaging from their mobile phones, desktop phones, or a remote service location |
| | <input type="checkbox"/> Have confidence that your cloud services providers take security measures that facilitate regulatory compliance | ✓ Elevate is independently audited and offers security protection across seven pillars |
| | <input type="checkbox"/> Protect your business files against malware, viruses, and cyber crime | ✓ Elevate quarantines infected files and integrates Sophos anti-malware capability |
| PUT AN END TO LEGACY PHONE SYSTEM COSTS | <input type="checkbox"/> Ensure cost efficient communications and collaboration without sacrificing quality or features | ✓ Elevate offers 90+ enterprise-grade calling features and excellent network call quality and uptime ✓ Flat, per-user rates with no annual contracts, no hidden fees, no hardware to buy, manage install, or replace ✓ A single web-based portal lets you configure the system and manage call reporting |
| | <input type="checkbox"/> Easier configuration and deployment | ✓ Elevate tightly integrates desk phones, mobile phones, chat, SMS, video conferencing, screen sharing, file sharing, and file backup to facilitate increased collaboration and productivity |
| | <input type="checkbox"/> Supplement desk phones with other communication channels | ✓ Elevate automatically rings all your end points with every call in the event you don't answer and routes the call to any number you choose |
| | <input type="checkbox"/> Ensure business continuity | |

Contact us today to find out how a fully integrated cloud communications platform can help your financial services firm thrive and grow.