PwC and Salesforce

Financial Flows

PwC's dynamic case management system

The case for digital enablement

From fragmented workflows built on legacy technology to over-customized designs that hit your system and workflow limits, today's systems are far too complex for the high volume, high turnover world of the contact center.

Remote working has increased the urgency for simple coordination and ease of information sharing across teams, while customers expect fast service and don't have the time, nor the patience, to repeat information or wait on the phone.

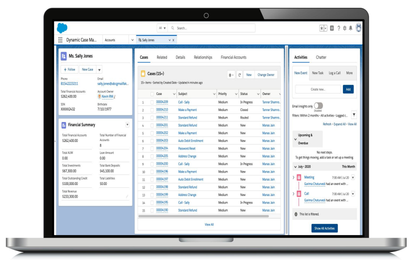
Introducing Financial Flows

PwC works with you collaboratively, leveraging our proprietary tools to build a dynamic case management system. We start with our pre-existing design and configure it in your systems to help you digitize, automate, and integrate Contact Center and Middle Office workflows on the Salesforce platform. We can more quickly help you configure Salesforce to:

- Automate workflows through task assignments, progress tracking, and case notes to ease communication between contact center agents and servicing operation teams.
- Integrate with product and core systems to reduce dual entry.
- Digitally track and report on volumes, status and KPIs.
- Start small with basic case routing and scale up to advanced workflows leveraging super users instead of Salesforce developers and administrators.

Value Drivers

- → Cost savings
- → Operational efficiency in Middle Office
- → Empowered agents and customers
- → Improved customer satisfaction scores



With the move to a more remote market, servicing your customers digitally is critical. The focus has shifted to:

Self-service
Providing digitally-enabled self-servicing to clients that didn't really exist in the past.

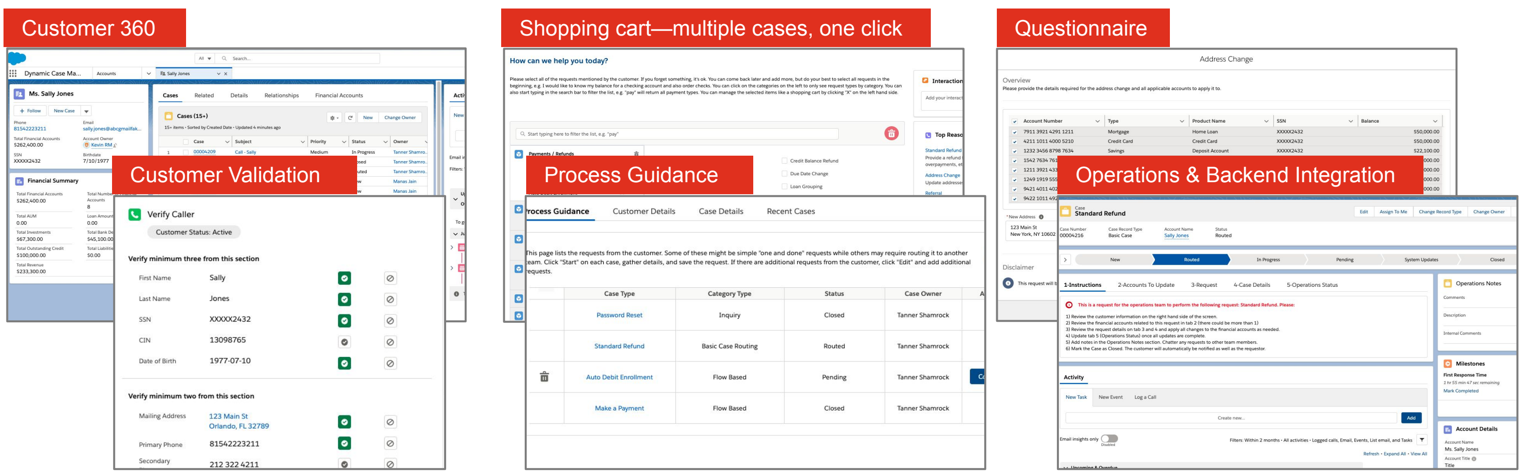
Consultative
Simplifying and automating the contact center intake process across all channels and moving towards providing consultative service.

Time and cost efficient
Automating and fully integrating hundreds of middle office workflows for operations teams to help reduce the hours of work and the cost.

Strategic
Not accepting the previous concepts of throwing paper and people at manual solutions and swiveling between multiple systems.

Rapidly scale a reusable design from basic case management to fully automated, streamlined dynamic workflows in Salesforce Communities and Service Cloud. Key features we enable include:

- Guided customer validation and authentication
- Shopping cart based interaction model suited to financial services, not focused on "cases"
- Persona (*e.g. servicing / originations / cards*) and role (*e.g. call on behalf of myself / power of attorney / co-signer*) servicing
- Data driven analytics and predictive capabilities - everything is measured
- Dynamic metadata-driven questionnaires for unlimited case types - informational, inquiries, one and done, basic routing, complex flows
- Operations center for contact center employees and operations teams
- Card servicing module
- Treasury management sales and onboarding module



Benefits we bring

- ➢ **Made for financial services**: Solution tailored specifically to banking and payments - interactions, not cases.
- ➢ **Developers not required**: Scalable, dynamic, completely driven by metadata - Business Superusers, not Developers!
- ➢ **Training needs are minimized**: Guided flows that prefill data and ask for exactly what's required.
- ➢ **Digitally-enabled**: Includes a support website portal.
- ➢ **Links all teams:** Contact Center, Operations, Treasury Sales / Operations, Cards, etc for retail and commercial banking.
- ➢ **Quick start and rapidly evolve:** Save months of development and scale quickly.
- ➢ **Standard workflows**: 50+ pre-designed workflows out of the box.

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