Financial Services Cloud
Unify the experience. Unlock loyalty.

Built on the world's #1 CRM platform, Financial Services Cloud enables financial services firms to unify the customer experience across channels, geographies, and both consumer and commercial lines of business. With purpose-built industry functionality and all the capabilities of Sales and Service Cloud, financial services firms can unlock unprecedented customer loyalty and achieve value faster than ever before.

Financial Services Cloud Features and Benefits

Financial Services Data Model and Console
Increase employee productivity and accelerate time to value with industry-specific objects, permission sets, and user interfaces.

Intelligent Needs-Based Referrals
Prioritize relationships and collaborate across lines of business with intelligent referral routing, scoring, and insights.

Person and Business Accounts
Consolidate and customize your customer view, and empower administrators to manage duplicate records easily.

Relationship Builder and Map
Link customers with households, trusts, and business groups, and visualize key relationships and centers of influence.

Financial Accounts and Rollups
Gain visibility into customers' and households' financial accounts and holdings, so you can deliver relevant products and services for their needs.

Action Plans
Manage customer engagements consistently and collaboratively with automated and compliant task orchestration.

Cases and Alerts
Link financial accounts, customers, or households to a specific case to trigger alerts and ensure service agents have the necessary information to resolve issues.

Surveys for Financial Services Cloud
Improve customer feedback with targeted survey questions and five free survey creator licenses.

Einstein Bots for Financial Services Cloud
Accelerate your Einstein Bot deployment with two retail banking bots that help customers report lost cards and place travel notifications.

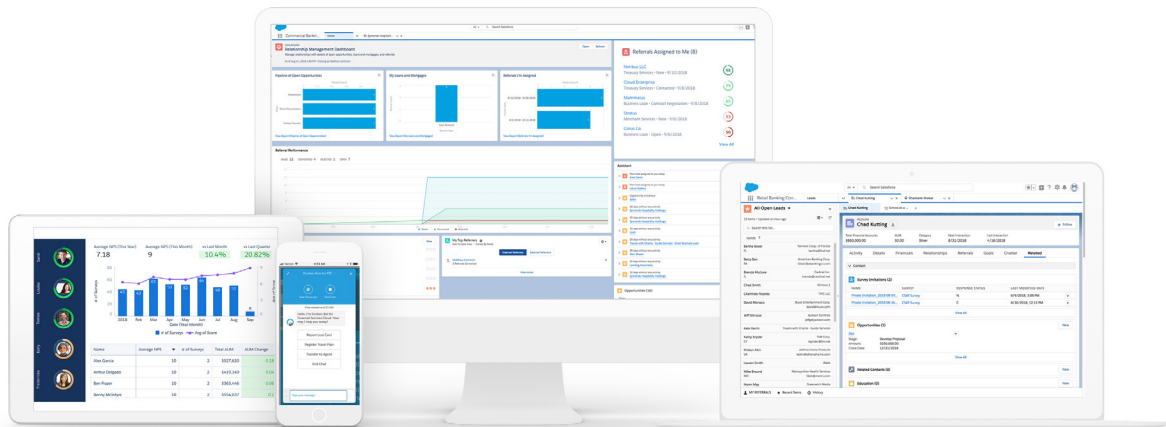### Einstein Analytics for Financial Services Cloud
Go from data to insights faster with pre-built, financial services-specific analytics and AI for segmenting your book of business.

Customer Portals
Leverage the financial services data model and components within self-service, customizable communities that feature embedded business processes.

Salesforce Shield
Secure your Financial Services Cloud data with additional security services built on top of our trust platform.

Deepen customer relationships with the world's #1 CRM, reimagined for financial services.

Retail Banking
Be the Bank Your Customers Love

38% **productivity increase***

Know your customers and their needs
Track and visualize key customer relationships and financial information, and keep context with a single pane of glass for managing customer engagements.

Unlock the full power of the bank
Source and prioritize referrals from across different lines of business, directly from customers, or from the customer's circle of influence.

Supercharge banker productivity
Drive the right, repeatable activities with intelligent insights and configurable task templates, and take action at the point of insight to deliver financial solutions faster.

Wealth Management
Build Client Trust with Relationship Intelligence

147% return on investment**

Personalize wealth client relationships at scale
Capture and visualize financial account information, goals, trusts, business groups, and interactions within and across clients, households, and relationship networks.

Supercharge advisor productivity
Jumpstart every advisor's day with a tailored list of tasks, client life events, opportunities, and access to essential client information aggregated by integrated partner solutions – all on a single pane of glass.

Make smarter and faster client decisions
Put artificial intelligence to work for your advisors, so they can personalize every engagement across their book of business with immediate insights and Next Best Action recommendations powered by Einstein.

Commercial Banking
Drive Transparency, Collaboration, and Productivity

46% **faster collaboration***

Improve transparency across lines of business
Create a holistic customer view throughout the bank with out-of-the-box objects for financial accounts, customer goals, and business banking services.

Collaborate around customer needs
Empower commercial bankers to identify centers of influence and capture customers' expressed interest for improved referral routing, scoring, and reporting.

Delight customers with convenience and consistency
Provide commercial clients with a streamlined onboarding experience powered by automated task orchestration and contextual customer surveys.

Insurance
Meet the Evolving Needs of Every Policyholder

41% **faster decision-making***

Turn customer data into meaningful policyholder engagements
Gain a single view of each customer's policies, claims, and cases on one screen to deliver better service and uncover opportunities for growth.

Provide proactive omni-channel support
Connect policyholders, agents, service reps, and field claim adjusters across any channel for personalized support and complete visibility at any time and from anywhere.

Empower agents and service reps
Unify all customer data on a single screen, and offer guided tasks for key insurance processes such as customer onboarding, claims processing, and more.

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Sign up today for a Financial Services Cloud trial at bit.ly/TryFSCfree.

* 2017 Financial Services Customer Success Metrics
** Nucleus Research: Salesforce Trilogy Financial ROI Case Study

"With Financial Services Cloud, we're seeing a **147% ROI** in just one year. That's substantial from any vantage point. We're really excited about what that means for our future."

– Nick Richtsmeier
EVP of Business Development, Trilogy Financial, and Chief Operating Officer, TrilogyCapital