DATA CLOUD FOR
FINANCIAL SERVICES

Data Cloud in the financial services space has multiple impressive value-add use cases, from tailoring opportunities in sales and automating service and support functionality to renewing account growth.

Create UNIFIED Customer Profile

Calculate & Stream INSIGHTS

Orchestrate ACTION

Whether your organization manages commercial banking, wealth and assets, fintech, or insurance, Data Cloud can revolutionize the way you reach out and engage with clients. A comprehensive implementation of Data Cloud can generate a unified customer ID by harmonizing insights such as transactions, credit profiles and risk, demographics, net worth, cash flow, life events, and goals into a single customer profile—so every touchpoint is in tune with the client's needs and wishes. Data Cloud also supports regulatory compliance and privacy requirements, so your business maintains trust and integrity while harnessing the power of data.

DATA CLOUD USES IN THE FINANCE INDUSTRY

Client Retention

Finance leaders can identify early warning of client churn across all lines of business and design corresponding targeted marketing campaigns for each area. Customer success teams can intervene personally with particularly at-risk clients.

Unlock Opportunities

With complete customer profiles efficiently organized, it's easier to quickly identify cross-sell or upsell opportunities, such as new investment products to existing clients in different lines of business. This also creates more tailored product portfolios for clients, synchronizing interactions across retail banking, wealth management, and more.

Security + Compliance

Safeguarding sensitive client information with real-time transaction monitoring is another Data Cloud use case, as well as adhering to regulatory compliance requirements and proactive fraud detection.

Customer 360

Data Cloud creates a single, unified profile for every client, leveraging multiple banking systems. This creates more consistent experiences across all client interactions and banking channels.

Segmentation

With comprehensive customer profiles to drive more clarity in sales, customer segmentation is more powerful than ever. Data Cloud can enable focused client categories to feed into targeted campaigns, proposing relevant financial products and simplifying the overall go-to-market approach across segments.

Market Intelligence

Data Cloud enables finance leaders to identify new growth spaces in the market and get ahead of trends before they hit the industry, creating competitive offerings and positioning for more market share.

PERSONA BENEFITS

Service Agents

can interact with Accounts to proactively and predictively recommend services and solutions through data derived from case information, renewal information, ongoing interactions and experience across similar client base.

Relationship Managers

get a comprehensive view of various financial accounts along with client's transactions and any alerts or holds on the account in a single interaction.

Compliance

can track data around regulatory metrics, view audit dashboards, at-risk customer segments, and verify overall compliance statuses across customer segments.

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Simplus can perform a strategic assessment within two weeks to craft a tailored pathway toward Data Cloud for your organization. This ecnompasses identifying use cases and architectural design as well as preparing a pragmatic project plan to lay the foundation for a data-driven revolution.

DELIVERABLES

- **Use Cases and Business Value:** A curated list of practical use cases paired with an analysis of potential value and benefits

- **System and Data Architecture:** A detailed depiction of the proposed system and data architecture for a clear vision of how Data Cloud will integrate with and enhance your existing ecosystem.

- **Initial Project Plan and Budget Proposal:** Outline of initial steps, milestones, timelines, and a comprehensive estimation of the resources and investment required for successful Data Cloud implementation.

Informed Decision-Making

Risk Mitigation

Value Optimization

ARE YOU DATA CLOUD READY? OFFERINGS TO SUPPORT DATA READINESS

Advisory Offerings
- Data Cloud Prestudy & Value Discovery Framework
- Data Cloud Adoption Strategy
- Data Cloud Readiness Assessment
- Use Case Repository

Consulting & Data Offerings
- Proof of Concept for Fitment Analysis
- Build Data Dictionary of all Data Sources & Data Quality Assessment
- C360/Salesforce CDP to Data Cloud Migration Roadmap
- Data Mapping Accelerator

Insights & Analytics
- Handbook of Industry Standard KPIs

Implementation & Support
- Data Migration & Consolidation
- Maintenance, Enhancements & Production Support
- Multi-Org CDP and Marketing Cloud Consolidation
- Fixed Scope - Fixed Price Offering Packages

Change Enablement and Sustainability Offerings
- OCM/Data Strategy and Analysis
- AI Change Readiness and Adoption
- Communication and Engagement
- Data integrity and Training & Enablement

WHY BTS?

Business Transformation Services (BTS) is part of the Infosys Salesforce practice, dedicated to strategic advisory, consulting, and architecture capabilities to deliver accelerated value from technology, process, and people investments. BTS drives transformational programs forward by leveraging the power of the Salesforce platform and supporting ecosystem into real-world scalable solutions while providing an end-to-end vision and journey of the technology and process change landscapes needed to support front-to-back office program success. BTS boasts expertise across Salesforce enterprise products, works in all major industries, and extracts key objectives to deliver customer-specific value for enterprise transformation programs.

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