



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"> ✓ Intermedia Unite integrates voice, chat, and video conferencing interactions on one platform ✓ With Intermedia 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, Intermedia Unite 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 ✓ Intermedia Unite lets meeting participants join from mobile phones, desktops, laptops ✓ Voice, chat, and email queues combine into a single omni-channel experience ✓ Anytime, anywhere communications from any device

	YOUR NEEDS	OUR SOLUTIONS
SECURE CLIENT COMMUNICATIONS AND INDUSTRY COMPLIANCE	<ul style="list-style-type: none"> <input type="checkbox"/> Manage risk by ensuring cloud service providers are independently audited <input type="checkbox"/> Protect or encrypt confidential client correspondence, files, text messages, voicemails, and email <input type="checkbox"/> Share documents securely <input type="checkbox"/> Choose cloud service providers with high uptime SLAs <input type="checkbox"/> Ease the audit process with configurable file retention policies, long-term storage, and by enabling access to archives by specific roles <input type="checkbox"/> Avoid use of and protect disclosure of employee mobile phone numbers <input type="checkbox"/> Have confidence that your cloud services providers take security measures that facilitate regulatory compliance <input type="checkbox"/> Protect your business files against malware, viruses, and cyber crime 	<ul style="list-style-type: none"> ✓ Intermedia is SOC 2 audited, which attests to our high security standards—for our products, networks, infrastructure, and privacy protection ✓ Emails, files, video conference recordings, and more can be secured at rest and while in transit ✓ Account-level encryption keys secure stored documents, and SSL/TLS secures them as you share them ✓ Our cloud is purpose-built for 99.999% uptime with a financially backed SLA ✓ Intermedia Unite 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 ✓ Callers see your business phone number, whether employees are engaging from their mobile phones, desktop phones, or a remote service location ✓ Intermedia is independently audited and offers security protection across seven pillars ✓ Intermedia Unite quarantines infected files and integrates Sophos anti-malware capability
PUT AN END TO LEGACY PHONE SYSTEM COSTS	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure cost efficient communications and collaboration without sacrificing quality or features <input type="checkbox"/> Easier configuration and deployment <input type="checkbox"/> Supplement desk phones with other communication channels <input type="checkbox"/> Ensure business continuity 	<ul style="list-style-type: none"> ✓ Intermedia Unite 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 ✓ Intermedia Unite tightly integrates desk phones, mobile phones, chat, SMS, video conferencing, screen sharing, file sharing, and file backup to facilitate increased collaboration and productivity ✓ Intermedia Unite 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

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

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



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