zoom

The Zoom Platform for Financial Services

Delivering competitive advantage with unifying financial experiences

Disjointed experiences

Customers are looking to their financial services institutions to offer new ways to connect, while employees expect a flexible working model to be the norm and demand a new type of agility from their employers.

It should be all about innovation and experience. All too often, it isn't. Multiple apps and poor integrations are creating redundant and inefficient services and workflows, and saddling firms with manual work and unnecessary costs.

Employees feel disconnected and customer experience is disjointed.

How do I live chat with my financial advisor?

How do I get into that online meeting?

Which platform should I use for my client presentation?

Integration issues

Communication channels are rarely connected to line-of-business CRMs and customer service applications. This forces employees to perform **time-consuming, error-prone manual tasks**.

Technical islands

Omnichannel customer experience can require customers to install and understand multiple apps. This leads to more confusion and **unnecessary friction throughout the customer journey**.

The experience imperative

Customers

71% of consumers expect companies to deliver personalized interactions.

Source: McKinsey

32% of customers will "break up" with a favorite brand after one poor customer experience.

Source: Ipsos/epsilon

Employees

92% of employers say enhancing customer experience (EX) is a priority over the next three years.

Source: WTW

63% of high-revenue growth companies are now embracing hybrid working models – where a consistent experience is critical.

Source: Accenture

Total experience, maximum effect

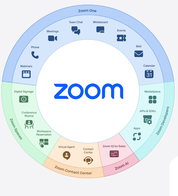
Empower your employees to deliver seamless, orchestrated, innovative services for customers across multiple teams, lines of business, and geographies. Enable scalable and efficient work through a single platform designed to support compliant communications.

30% of financial services institutions believe their digital experience is 'behind' consumer expectations.

Source: Adobe

Become a more connected and competitive financial services institution with Zoom.

Read more



A unified answer to enhancing the financial services experience

Offering chat, phone, whiteboard, meetings, conference room and workspace, webinars, and contact center solutions, the Zoom platform addresses the needs of modern financial services institutions.

Whether users are on a mobile device, laptop, or in a meeting room setting, they enjoy the same intuitive interface and a single place for all their interactions. Plus, by seamlessly integrating everyday financial services applications with Zoom, it's easy to create the frictionless experience that employees and clients crave.

> **"Zoom was the easiest part of our digital transformation – it was the intuitive nature of the experience."**
>
> Melanie Frank, Managing Vice President, Cyber Engineering

Capital One

Three critical use cases

1. Face-to-face virtual banking
2. Quick and effective customer support
3. Virtual events with up to 50,000 attendees

Integrations made for financial services institutions

Choose from 1,000+ pre-built integrations or build your own powerful video-first banking applications with Zoom Video Software Development Kit (SDK), Zoom Meeting SDK, and our powerful developer platform. Some relevant integrations include:

CRM integration for a holistic view of customers.

Archiving integration to support archiving for regulatory requirements.

Electronic document signing integrations to accelerate agreements.

Data loss prevention integrations to help secure conversations.

Delivering required compliance guardrails to help manage risk

- Data routing control
- End-to-end encryption options
- Meeting and Webinar Archiving
- Information barriers
- Data loss prevention (DLP) integrations

Certifications, attestations, and standards

- Security safeguards to help financial services institutions meet Gramm-Leach Bliley Act, NY DFS, GDPR, and other security compliance requirements.

8 of the 10 largest U.S. banks and over half of the world's largest banks have chosen Zoom.

Read more

Why Zoom for financial services

Complete capability

A single, unified communications experience, with enterprise-grade security and compliance built-in to support evolving regulatory changes.

Unique platform flexibility

Native integration to support greater unification and orchestration of fragmented financial processes.

Greater speed of innovation

Keep pace with an increasingly competitive financial services sector with countless customer-led enhancements, released every year.

Unmatched quality of service

Meet and exceed increasing client and employee expectations with robust, high-performance communication.

We're connecting financial services customers worldwide, including:

Capital One · FINRA · nab · Fidelity · Nasdaq · ally · Happy State Bank · The Motley Fool

Get started with Zoom

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