



Zoom Phone for Financial Services

Today's financial services institutions face ever-evolving customer expectations, all while navigating a complex security and regulatory landscape.



Zoom Phone Meets Today's Challenge

Zoom Phone is a modern cloud telephony solution designed for financial services institutions that want to deliver a quality, reliable experience for their employees and customers and enable cost savings. It is designed to support compliance with GDPR and can support institutions that must adhere to financial services regulations such as SEC Rule 17(a)-4.



An all-in-one phone system

Zoom Phone is the cloud PBX solution built for the Zoom platform. It can replace your existing phone system and work seamlessly with video meetings, chat, and more. It offers HD voice that delivers high-quality audio.



Zoom Phone Features for Financial Services

From headquarters to branch locations, financial services institutions can use these Zoom Phone features to support their unique communications needs:



Single Client Experience

Zoom is available on PC, Mac, iOS, and Android. Once licenses are provisioned, a full-featured phone experience will be available in the Zoom mobile and desktop application, which provides one easy platform for communications.



Call Monitoring

If coaching for a new employee is needed, call monitoring can provide a user with the ability to engage privately to assist. Monitoring options include:

- Listen: Attend a call made by another Zoom Phone user.
- Whisper: Speak to the monitored user in a call.
- Barge: Join a call and speak to all parties. The call will become a three-way call.
- Conference Barge: Up to 10 users can barge into an in-progress, shared-line-group call.
- Take over: Take over the call from the monitored user.



Elevate a call to a Zoom Meeting

Take a phone call to the next level. With a single click, a simple call can become a full-featured Zoom Meeting with content sharing and video.



Auto-Receptionist & IVR Templates

Easily build auto-answering options to address main line incoming calls. Customize business hours, greeting prompts, routing rules, and the voice response menu.



Call Recording

Admins can use either ad-hoc call recording services or automatic call recording with optional integration with leading third-party archiving vendors. Both support configurable options for automated transcription and methods for alerting call participants that a recording is in progress. Admins can configure policies for either option at the account, group, site, and user level.



Information barriers

Designed to help you control user communication policies and meet regulatory requirements at scale. You can use information barriers to prevent certain groups of users with confidential information from communicating with others who are not allowed to know this information.



VDI Optimization

We've optimized Zoom Phone for all relevant plugins and platforms, including Citrix, VMware, Azure Virtual Desktop (AVD), and more. These plugins can work across Windows, Mac, and a variety of Linux distributions.



Retention Policies

System administrators can configure account-wide rules for what data is retained, the duration of the retention period, and how to delete data.



Mobility

With Zoom Phone, employees can be reachable on their work number outside of the office via mobile device or desktop.



Delegation/Shared Line Appearance

Set a delegate, such as an assistant, to manage calls on behalf of managers. A visible shared line appearance provides easy call handoff.



SMS/MMS

In addition to voice communication, Zoom Phone provides text messaging (SMS). When communicating with others is best delivered as a text message, Zoom Phone has your institution covered.



Call Queues

An administrator can configure incoming calls to route to a designated group of users. Call distribution can be configured based on simultaneous, sequential, or rotating options.



Voicemail Transcription

Zoom Phone provides visual voicemail and automatic transcription if users prefer to read voicemail messages. Voicemail notifications are delivered via email with a transcription of the message and an audio file attachment. They can also be accessed in the Zoom client.



Nomadic E911

Zoom Phone allows users to contact emergency services from any location and simultaneously alert an internal safety team without the need for an additional 911 service provider.



Reporting & Analytics

Leveraging the easy-to-use centralized administration portal, you can provision and manage users, intelligently monitor business interactions, and more.



Microsoft Teams integration

The Zoom app for Microsoft Teams provides access to both Zoom Phone and Zoom Meetings in a Teams channel or conversation.

Compliance recording capabilities

Zoom Phone's automatic call recording feature can be configured for users and call queues that need to record all interactions. These recording capabilities can be used to meet certain capture, storage, and maintenance requirements:

Capture	Storage	Maintenance
<p>Record certain communications by using the following:</p> <ul style="list-style-type: none">● A highly fault-tolerant recording architecture● A "Fail Closed" solution to prevent a call from starting or proceeding if it cannot be recorded, alerting designated personnel if there is a failure● Automatic call recording user/group policy with options for automated announcements and a side-tone indicator● User/group policy restrictions to prevent users from moving forward, transferring, or re-routing to non-recorded destinations or deleting recordings, voicemails, or SMS	<p>Appropriately store recordings by tailoring the following to your institution's needs:</p> <ul style="list-style-type: none">● Geo-appropriate location(s) for storing your content● Data retention policies● Options for customer-provided storage and support for third-party archiving	<p>Make sure recordings can be accessed and audited by enabling the following:</p> <ul style="list-style-type: none">● Role-based access to comprehensive and searchable logs for calls, voicemails, recordings, and SMS● Role-based access to actual recorded content to ensure only designated personnel can review or audit.● Comprehensive operations logs that include when recorded content is accessed and by whom.● Reporting on "who must always be recorded" and "who has access to those recordings."