

Banking CIO Outlook

August - 07 - 2019

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Top 10 Customer Experience Solution Providers - 2019

“Customer is King” For long, businesses, across industries, have abided by this age-old mantra as the only sustainable way of growing a business. Today, as the demand of the customers for a seamless experience with the brands is steadily increasing, even the sluggish pace of the banking industry in delivering enhanced Customer Experience (CX) has started to gain momentum. To enable the banks in achieving their goal of CX transformation, several technology vendors are ushering new developments, solutions, and services with a focus on connecting with customers through various digital touchpoints. They are assisting the banks in building integrated management tools. From providing self-service kiosks at the banks to building digital signage solutions (DSN), these solution providers are striving to make banking experience smooth and highly personalized.

The trends of omnichannel banking, video chat support, live engagement platforms are expected to rise steadily as

the banking sector keeps enhancing their CX transformation. The top CX solution providers are helping the banks in developing AI-enabled chatbots and integrated customer support platforms. They are helping the banks to grow not only as a transactional service provider but as an end-to-end support system for the customers.

CX data makes it easy for the banks to conduct research on consumer behavior and develop customer experience by anticipating their needs. It also gives them a wide range of insight into the prospect of their competitive market. To aid organizations on their mission of choosing the right solution provider in this vast banking technology market, the editorial team at Banking CIO Outlook, in conjunction with an illustrious panel of CEOs, CIOs, VCs, and industry analysts, has put together a list of the ten most promising customer experience solution providers in the industry. The list intends to help the banks find a trustworthy ally.

We present to you Banking CIO Outlook’s “Top 10 Customer Experience Solution Providers - 2019”.



Company:
360 View

Description:
360 View offers a customizable growth platform that allows banks and credit unions to enhance their customer experience

Key Person:
David Acevedo
Senior VP &
National Sales Director

Website:
360view.com

360 View

Empowering Organizational Growth by Enhancing Customer Experience

The tables have turned on the operating environment for financial institutions as customers now expect a more personalized experience. The digital-first customers want their banks and credit unions to offer tailored services that take into account their needs and priorities. Acknowledging the significance of customer-centric services, financial institutions have started to leverage data to deliver a personalized customer experience. The amount and accuracy of data now available allow banks to run an efficient program around their business processes, encompassing sales, marketing, and operations. To empower banks and credit unions to fully use their data, 360 View takes center stage with a growth platform that delivers all the necessary tools to improve efficiency and productivity. “Our growth platform is more than a CRM solution,” states David Acevedo, Senior VP and National Sales Director at 360 View about the platform. He further adds, “In addition to CRM, our platform encompasses marketing automation, profitability, analytics, pop-up technology and goals and incentives automation.”

360 View provides these tools through its growth platform for a comprehensive and consistent customer experience throughout the organization. Based on each bank’s unique programs, the platform can help identify a customer’s next likely product, enabling the bank to offer the right product at the right time. “Our growth platform enables both our clients and their customers to grow and build a meaningful and profitable relationship,” says Acevedo on the unique value proposition of 360 View. The platform allows referral, service resolution, and pipeline tracking, all with comprehensive reporting. The solution also offers personalized dashboards that enable users to obtain a full understanding of their customer base and manage sales leads, service requests and employee performance. 360 View has API services, enabling banks to interact with other ancillary systems. Adding flexibility and uniqueness to its services, 360 View delivers an employee performance measurement tool that automates key performance measures and tracks incentive programs for employees.

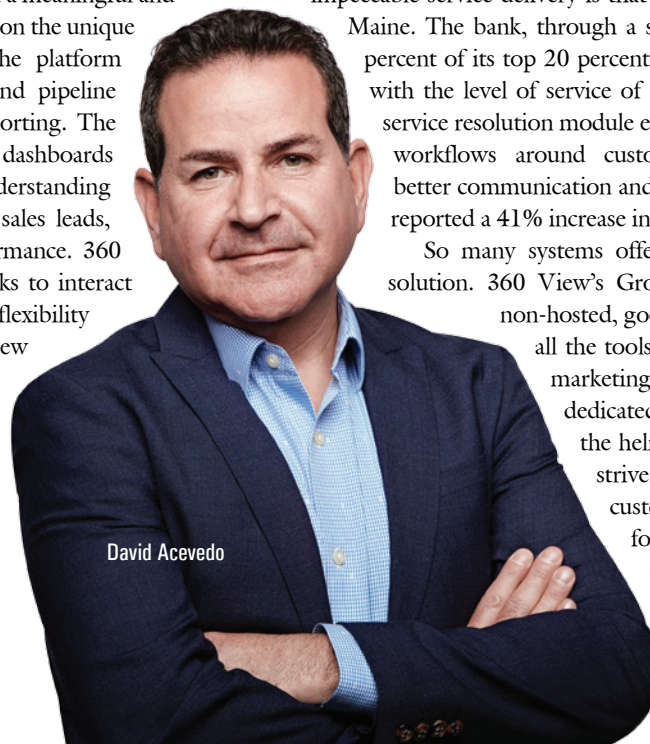
What makes the growth platform of 360 View work for clients is its offering of true intelligence. The

platform allows the financial institution to offer customized experiences based on the customer’s demographic and wealth data. A personalized data-driven approach permits the banks and credit unions to pinpoint their marketing efforts to the appropriate customers. To add to the company’s promise of excellence, 360 View also automates these marketing efforts, making the entire customer journey seamless.

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One of the most distinctive factors of 360 View—they are bankers who have built a solution for other bankers. They know the business and have demonstrated this in the development of their growth platform. They are devoted to improving the profitability of their financial institutions. The platform offers extensive insights into relationships and profitability which allow financial institutions to strengthen their relationship with their existing customers as well as make new ones. An engaging customer success story that validates 360 View’s promise of impeccable service delivery is that of a billion dollar bank in Maine. The bank, through a survey, discovered that 46 percent of its top 20 percent of clients were not happy with the level of service of the bank. The 360 View service resolution module enabled them to implement workflows around customer issues resulting in better communication and response times. The bank reported a 41% increase in customer issue resolution.

So many systems offer CRM as a stand-alone solution. 360 View’s Growth Platform, hosted or non-hosted, goes beyond CRM providing all the tools necessary to bridge sales, marketing and operations. With a dedicated and experienced team at the helm, 360 View continues to strive towards enhancing the customer experience, both for their clients and their clients’ customers. **BC**



David Acevedo