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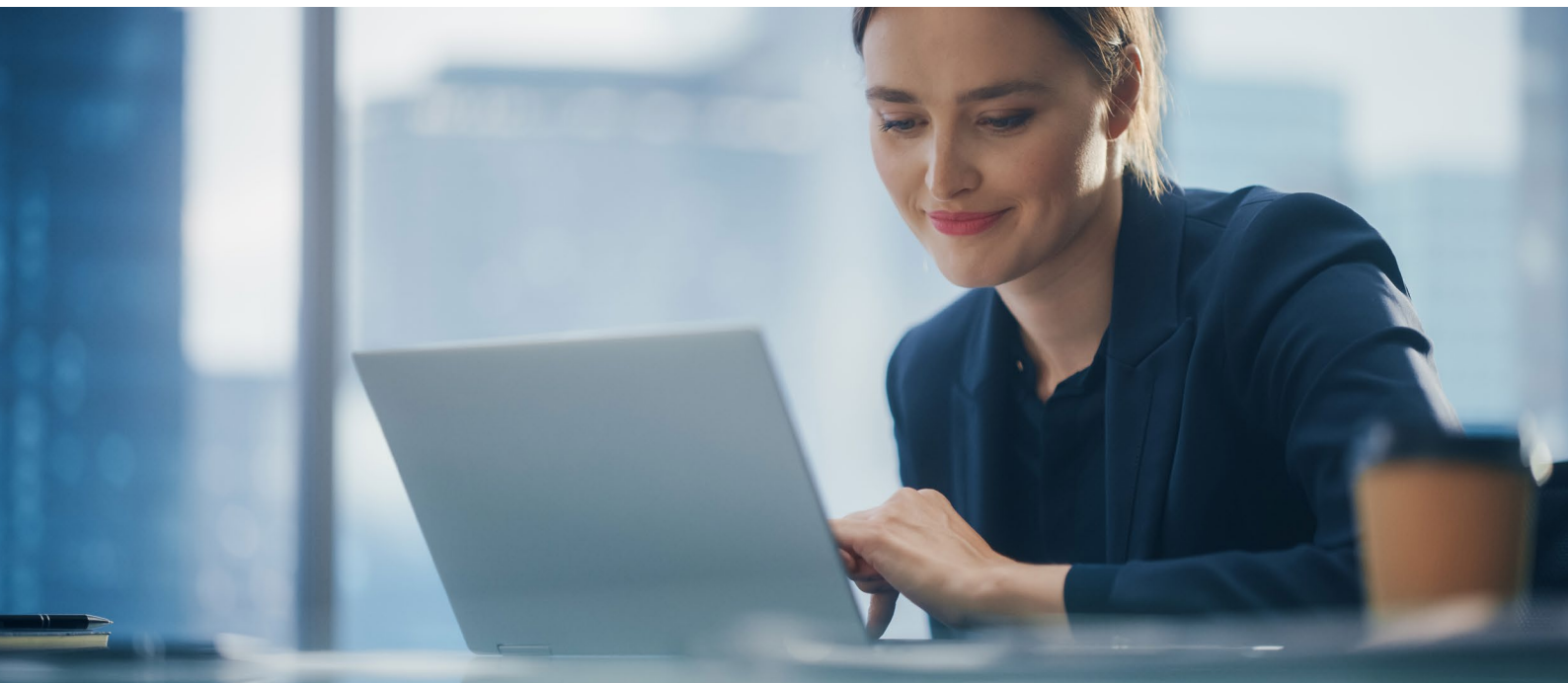
SOLUTION OVERVIEW

OpenText Total Experience for Financial Services

Increase customer and employee satisfaction, brand loyalty and revenue growth

Gain customers for life

Empower employees to deliver for customers

Get insight for better decisions

Manage risk and compliance

Mounting customer expectations, a rise in the remote workforce and regulatory changes require Financial Services institutions (FSIs) to optimize operations to remain competitive. FSIs need to deliver the trusted, relevant and optimal experiences that internal and external customers demand, across all channels, every time. Unfortunately, information is often stored in multiple systems, limiting visibility into the customer lifecycle and leading to delays, incorrect information and poor service.

Operated and managed in the cloud, OpenText Total Experience for Financial Services is a personalized and integrated service-based solution that helps employees provide customers with a white-glove experience by infusing content across the ecosystem. The integrated cloud solution delivers secure communications while enforcing privacy and compliance by design. It helps organizations be audit- and e-discovery-ready while maximizing the value of each interaction for increased productivity and unmatched customer satisfaction.

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International insurance company MSIG Asia builds omnichannel self-service capabilities and grows its business with OpenText Total Experience for Financial Services.

"This OpenText customer-centric integration will help maximize our operational efficiencies across different lines of business and locations, which in turn helps lower expenses and strengthens our business infrastructure."

Joseph Yew
CIO
MSIG Asia

⊡ Read the Success story

OpenText Total Experience for Financial Services gives companies the competitive edge to stand out from the pack.

Gain customers for life

Exceptional experiences at all stages of the customer journey build relationships that last. Delight customers by providing rich, relevant and targeted communications across all channels. Enable realtime communications and easily manage new formats, such as images, video, 3D and virtual reality. Optimize customer experiences by testing and targeting communications.

## Empower employees to deliver outstanding customer experiences

There is no Customer Experience (CX) without Employee Experience (EX). Provide employees with information when and where it is needed so they can make smarter, faster decisions that deliver a better customer experience. Connect content and processes to enhance collaboration and exception handling on cases—both within and beyond the FSI (customers, brokers and any other third party), enabling employees to stay informed and productive wherever they are. Optimize and automate repeatable business processes to reduce transaction times, expedite customer onboarding processes, ensure consistent execution across departments and free up knowledge workers for higher value activities.

Get insight for better decisions

Fuel customer-facing teams with AI-driven intelligence to anticipate the next best action, next best offer and next best channel throughout the customer journey. Improve customer journeys with real-time analytics and orchestration capabilities. Leverage advanced artificial intelligence and data analytics for actionable insights, powering intelligent customer self-service and individualized interactions.

Enforce risk and compliance

Support compliance and governance while keeping data live and accessible for daily operations. Ease document collection while allowing users to access and search content from anywhere to support internal and external audits. Deliver automated, complete, comprehensive lifecycle management. Establish an audit trail for all corporate records and enterprise information holdings, in physical and electronic format, while automating periodic customer file maintenance.
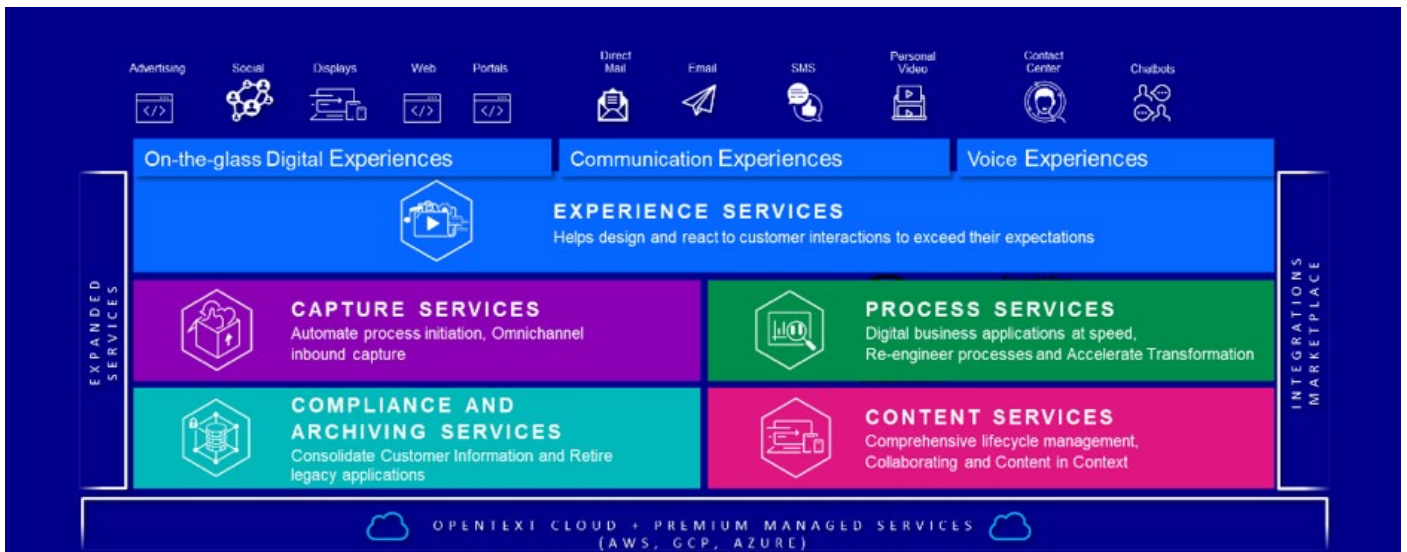
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Total Experience for Financial Services

Solution components	
OpenText™ Experience Platform for Customer Experience Management	Take a holistic approach to personalized communications and digital experiences across the customer journey with one platform.
OpenText™ Exstream™	Transform personalized customer communications across customer journeys into exceptional experiences.
OpenText™ TeamSite™	Extend digital experiences beyond the web to across all customer and employee channels with one platform.
OpenText™ Media Management	Introduce immersive, rich media experiences that drive better customer engagement with powerful, easy-to-use access to digital assets.
OpenText™ Extended ECM	Bridge information silos, improve processes and strengthen governance.
OpenText™ Intelligent Capture	Transform documents into actionable business insights.
OpenText™ AppWorks™	Automate and optimize business processes with a low-code app development platform.

⊇ Learn more

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: **opentext.com**.

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