

# Advisor Transformation with Deep Personalization

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A comprehensive solution from Capgemini to digitally empower the advisors and refine the customer experience with effective personalization

### The Digital Experience at Scale Imperative <sup>2</sup>

In the current pandemic-induced digital-first world, imparting a personalized omnichannel customer experience is no more an option but a mandate for businesses. As a result, businesses are now actively pursuing innovative solutions to transform their advisory services to:

- Amplify the digital presence with an Advisor friendly framework with self-service options helping them
- Refine the Customer Experience through continuous test and target capabilities and deliver a hyper personalized omnichannel , digital experience to the end customer
- Provide access to advisors to a 360-degree customer view to engage effectively with end customer
- Engage virtually with their end customers in the current touchless ecosystem

Businesses face numerous challenges to undergo the advisor transformation. Some of them are: <sup>3</sup>

- 40% of the advisors are finding it difficult to meet customer expectations
- Only 15% of customers are satisfied with their brands' digital experience
- Businesses spend up to 80% of their IT budget on maintaining their legacy systems
- Lack of tools and technology for the advisors

Capgemini's **Advisor Transformation with Deep Personalization** focuses on leveraging data to deliver a personalized experience while empowering advisors with self-service avenues to host their own websites and enjoy access to customer data to derive actionable insights for efficient engagement with their customers

Business Impact <sup>1</sup>



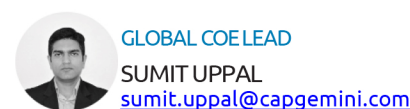
### What We Deliver

- We enable financial advisors to collaborate with customers with a personalized advisor listing based on “Just for you” experience
- We deliver **cookie-less** personalization, data-driven digital marketing which results in agent empowerment
- We ensure an **intuitive experience** enabling self-service operations to support operational efficiencies, growth, and less IT dependency
- We enrich the **marketing campaigns** with a 360-degree view of the customer through multi-source data profiling and strong analytics
- We enable financial advisors to **connect virtually** with their customers through Azure bot and MS-Teams integration
- We increase your control over **data security** and privacy with greater visibility over where your data comes and goes

Learn how to transform advisory services with Capgemini. Email us at: [fssbuadobecoe.global@capgemini.com](mailto:fssbuadobecoe.global@capgemini.com)



### Key Contacts



Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. It is a responsible and diverse organization of 290,000 team members in nearly 50 countries. With its strong 50-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2020 global revenues of €16 billion.