360 asklogix

Your Success, Our Salesforce Expertise

salesforce

Supercharge Salesforce with Omnichannel communication

SMS

AI

FINANCE SECTOR

Accelerate Growth in Financial Services with Salesforce

Boost Client Acquisition & Retention with SMS, WhatsApp, CTI & AI.

What ROI & KPI of our Salesforce Omnichannel Communication solution ?

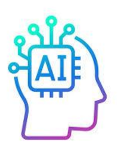
Use Case	Estimated ROI	KPIs
Customer Onboarding	30–50% ↑ in conversions	Account activation time ↓ 50%
Loan Application Support	40% ↓ in drop-offs	Application completion rate ↑ 25%
Client Engagement & Retention	20–30% ↑ retention	Customer churn ↓ 20%
Debt Collection	25–40% ↑ on-time repayments	Days sales outstanding (DSO) ↓ 30%
Wealth Management Upselling	15–20% ↑ in AUM growth	Cross-sell rate ↑ 25%
Fraud Detection & Prevention	35–50% ↓ in fraud losses	False positives ↓ 20%, Detection speed ↑ 40%

USE CASE 1 :Lead Generation & Conversion

Accelerating Pipeline Velocity with Real-Time Outreach

- Instant acknowledgment of inquiry
- AI-generated product/service suggestions based on profile
- Automated follow-ups based on browsing or interaction behavior

- Click-to-call from Salesforce
- Auto-dial call lists for MQL/SQL outreach
- Screen pop-up with client history & financial profile



- Predictive lead scoring for RM/advisor prioritization

USE CASE 2 : Onboarding & KYC Support

Simplifying Onboarding with Omnichannel Support

- Document collection & KYC reminders
- Account opening status updates
- AI chatbot for FAQs (KYC, products, processes)

- Smart routing based on product interest (e.g., loans, wealth)
- Call tagging & compliance note logging
- Real-time call transcription for quality/compliance

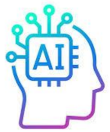
- Sentiment analysis to detect onboarding friction or drop-off risk

USE CASE 4 : Collections & Payment Support

Improving Recovery Rates & Client Experience

- Payment reminders & links
- EMI alerts & bounced payment notices
- Instant payment confirmations

- Callback triggers for defaulters
- Escalation to finance with notes



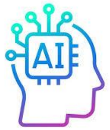
- Risk profiling to prioritize high-default probability cases

USE CASE 5 : Cross-Sell & Upsell

Driving Revenue Through Smart Engagement

- Timely nudges for relevant offers (credit card, insurance, loans)
- Investment plan alerts based on client goals
- Product eligibility notifications

- Advisor-led outbound campaigns
- Follow-up calls on SMS interactions



- Behavioral segmentation for personalized upsell journeys

USE CASE 6 : Client Retention & Loyalty Programs

Building Long-Term Client Value

- Loyalty point updates
- Event/webinar invites (e.g., financial literacy, market outlook)
- Feedback & testimonial requests

- RM follow-up on NPS feedback
- High-net-worth re-engagement calls

- Lifecycle-based segmentation to deliver high-touch campaigns

KEY BENEFITS of SFDC Integration with AI
Why It Works for Financial Institutions

- 360° client interaction visibility
- Seamless workflow automation from lead to loyalty
- AI insights to boost advisor productivity & CX
- Unified reporting across all client communication channels
- Improved conversion, retention, and share of wallet

NEXT STEP : Ready to Elevate Client Engagement?

- Audit your current client communication infrastructure
- Identify automation, AI & compliance opportunities
- Launch pilot with SMS/WhatsApp, CTI & AI in SFDC

THANK YOU

Contact us to craft a compliant, high-impact engagement strategy for your financial services business!

Arnaud MERCIER

+44 7805565876

contact@360asklogix.com

https://www.360asklogix.com/