

UNBLU CASE STUDIES

Private Banking

Dedicated interaction capabilities for an enhanced HNWI advisory experience



Private Banking
Unblu client



Our client is a long-standing institution that has retained a strong reputation for centuries. In recent years, there has been a growing demand from the client and partner (family offices) base for more digital capabilities. HNWLs are beginning to expect the same level of digital services as they are familiar with in retail banks.

Moreover, security challenges – with fraud attempts taking place on a weekly basis – are forcing the sector to innovate and seek out more secure means of interactions.

To better serve and protect their High Net Worth clients across key European countries, the management decided to equip their Relationship Managers and Assistants with Secure Messaging capabilities.

The initial phase of the project focused on enabling Secure Messenger behind our client's ebanking authentication both on desktop and application.

As a second step, Unblu will be integrated into Microsoft Dynamics (CRM) to enable RMs to manage conversations from within their CRM.

Main Goals



Reduce emails as a means of sharing sensitive documents, such as monthly investment reports or ID certifications



Tailor the messaging channel and its logic to the Microsoft Dynamics 365 workbench (CRM, MS Teams, etc.) of the advisors and assistants



Leverage Secure Messenger's outbound and collaborative messaging capabilities to enhance the experience for both clients and advisors



We are currently working to deploy in 8 countries (United Kingdom, Switzerland, France, Monaco, Belgium, Luxembourg, Italy, Germany)

A total of 300 Relationship Advisors are equipped with Unblu.

Phase 1:

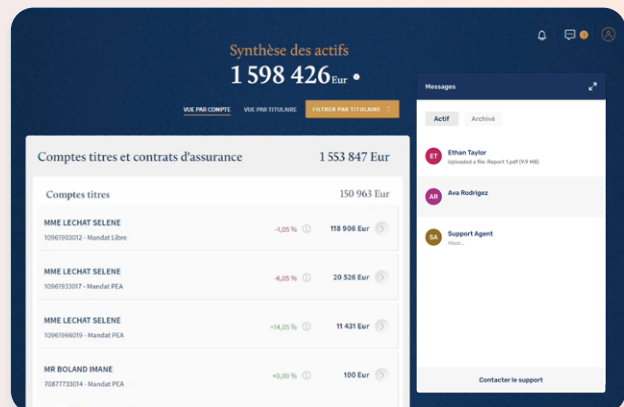
Secure messaging in, emails out

The monthly performance report must match the quality and reputation of the institution's paper-based option.

Delivering this involves offering the clients a secure channel to access their sensitive information that is protected by ebanking authentication to combat rising fraud.

Replacing emails with Secure Messenger

Secure Messenger has been embedded in both the mobile and desktop version of the bank's client portal. RMs will now leverage this channel to share sensitive materials.



Director of Client Experience

“Our bank is known in Paris as the private bank with the best and most complete investment paper reporting.

We want to carry our legacy over to the digital space, which is one of the reasons we chose Unblu for handling advisor/client conversations. A lot of configurations are possible, making this channel appear tailored to the bank.”



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Digital channels are increasingly common in private banking. In France, our client reported a 10pts increase in digital usage over the last 18 months. Today, over 60% of their French customers use digital services on a daily basis.

This is a testament to the results a private bank can achieve by improving client journeys, adding new functionalities, and increasing communications.

Phase 2:

Matching advisor & assistant work habits

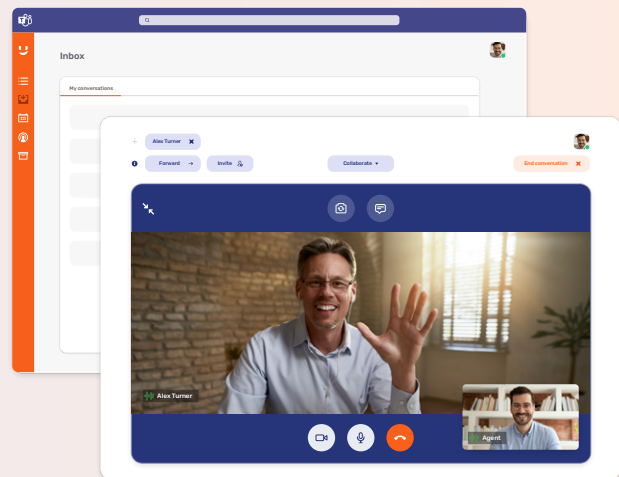
The relationship between clients and advisors is at the heart of every private bank's service offering. The trust built between these individuals is thanks to the hard work of many stakeholders, including advisor assistants, research experts, patrimonial engineers, portfolio managers, and more.

The delicate balance of these relationships must be maintained, making it critical to introduce new capabilities like Secure Messenger in a non-intrusive manner to drive adoption.

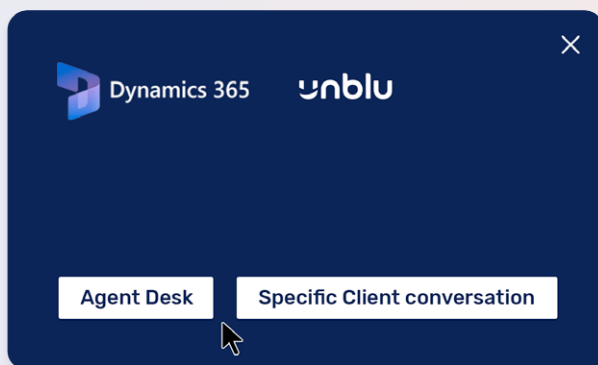
Unblu X MS Teams Integration

This allows our clients to:

- Make Unblu Spark capabilities available via MS Teams, from secure messaging to Video & Voice and beyond.
- Provide the advisor with a single desktop view, allowing them to manage internal and customer communications securely.
- Leverage the MS Teams SSO functionality.



Unblu X Microsoft Dynamics



Our client's advisors make use of Microsoft Dynamics to manage their clients. Therefore, it is important that any new capabilities are compatible with this ecosystem.

The Microsoft Dynamics interface is enhanced with three distinct Unblu triggers, which Advisors utilize to initiate Unblu Conversations with their corresponding clients.

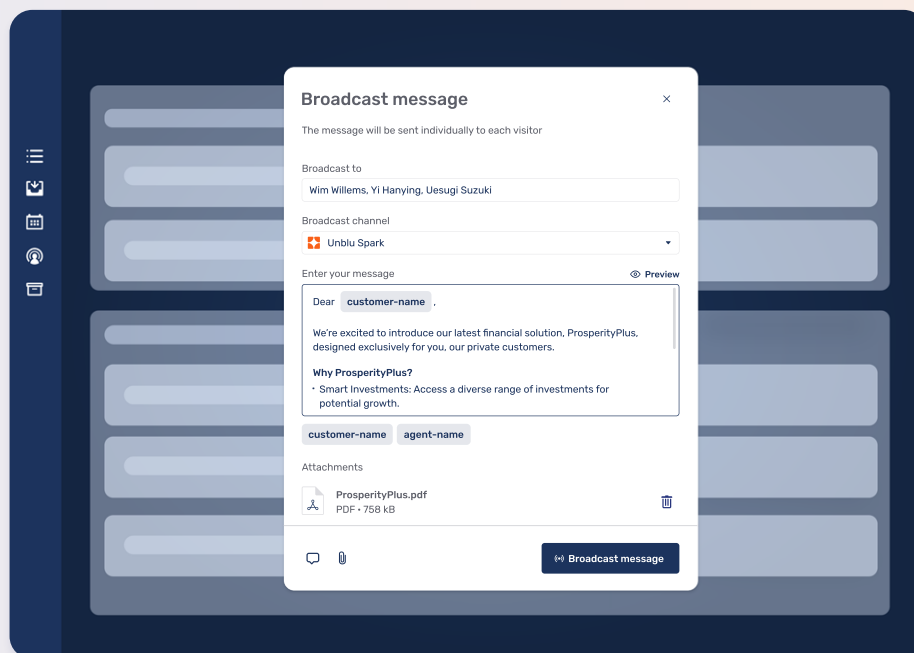
Phase 3:

Delivering added value to both clients and advisors

Secure Messenger can be further leveraged to provide enhanced collaborative and outbound messaging capabilities.

Beyond offering a secure channel for clients and advisors to discuss financial strategies and market performances, Unblu:

- Increases client touchpoints through semi-automated functionalities
- Generates internal efficiencies thanks to the embedded collaborative features



Distributing relevant information to all clients or a subset of identified clients

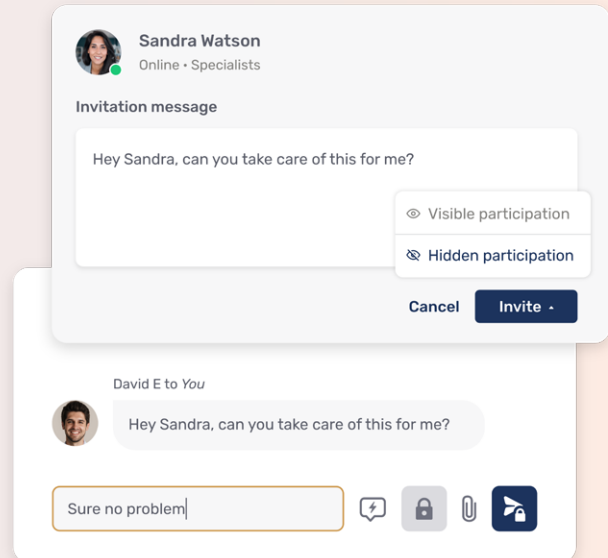
Whether new research, market updates, or portfolio changes, clients need to be kept up to date on a regular basis. The broadcasting feature empowers advisors to manage what is sent to specific clients, including the option to automate outbound messages.

The team can simply input the name of the different clients interested in a piece of research. Alternatively, they can leverage the different labels associated with each client to inform according to area of interest.

Enhanced collaboration: Increasing collaboration efficiency with internal stakeholders

Internal communication and collaboration often needs to take place within an Unblu conversation, but without impacting the end client's experience. The advisor-assistant duo is the cornerstone of our clients' client relationship strategy, with both working hand in hand to deliver on client expectations and advisory needs.

Unblu's flexible conversation parameters and unique capabilities, such as hidden participants and internal messages, allow our clients to retain the dynamic of this key duo within their digital client interactions.



Client quote



Director of Client
Experience



Private Banking
Unblu client

“The Unblu team has been nothing but great in helping us configure Unblu Spark to reflect our brand, our way of working, and how we engage clients. Unblu’s focus on the financial services industry gives them a level of expertise and know-how regarding the complexity of IT projects in our industry. This is a clear added value to an organization like ours looking to digitalize critical parts of our business.”



Want to find out more?

Visit www.unblu.com/resources to access webinars, documents and use cases about our features and solutions.

If you have any questions, please email us at sales@unblu.com