



Financial Services Solutions



**KEEP AND
ATTRACT MORE
CUSTOMERS**
without breaking the bank

Take your financial services organization **to the next level** with a unified communications solution that enhances the customer experience while providing the common controls customers can use to help address their regulatory compliance requirements.

Competition and customers are driving a demand for innovative solutions that keep existing customers loyal while attracting new business. To differentiate yourself from the competition, you need to offer personalized customer care across all delivery channels taking into account security, reliability, and efficiency.

Transform your business into a "customer-first" culture.

Personalized Digital Engagement

Serve customers across their preferred communication channels and time with AI-powered voice and chat bots.

Seamlessly Simple

Deploy communications solutions that are easy to adopt, integrate, manage and use across the whole organization.

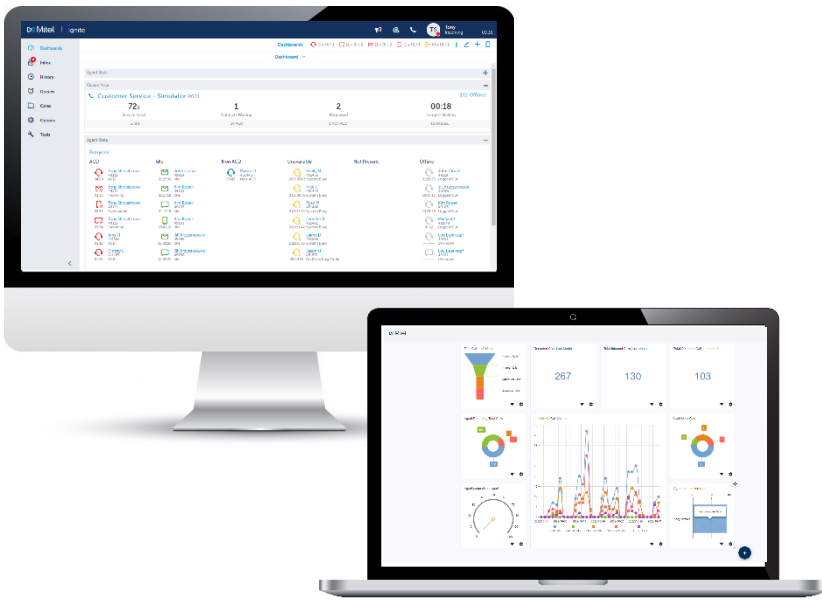
Digitally Transform With Regulatory Compliance in Mind

Have peace of mind knowing that Mitel Financial Services Solutions include common controls which you use to address requirements in your regulated environments (such as GDPR, the Dodd Frank Act, PCI DSS and MiFID II) which require security, privacy, and/or anti-fraud measures.*

Optimize Performance While Managing Risk

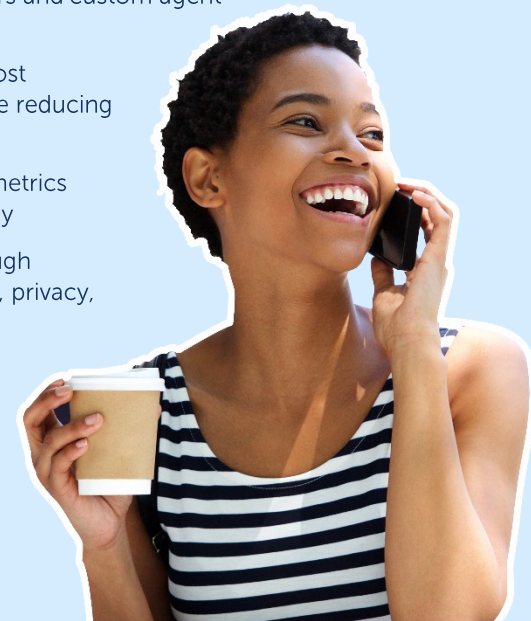
As a financial institution, you frequently record customer transactions for compliance and quality management purposes. Mitel Financial Services Solutions helps ease the burden of maintaining your regulatory compliance while optimizing the performance of your staff.





Mitel Financial Services Solutions will help you increase First-Contact Resolution (FCR), reduce customer churn, elevate customer satisfaction (CSAT), and improve Net Promoter Scores (NPS) by equipping every employee with the tools to deliver exceptional customer service.

- **Improve your Customer Experience** with Mitel's omnichannel CX solutions that allow you to serve your clients on their preferred channel (phone, email, SMS, Web Chat, social media, etc.) in both self-service and human-assisted service modes
- **Introduce new products or services to customers quickly** with Mitel's suite of flexible CX solutions that offer AI-powered self-service chat/voice bots as well as agent and employee assistants
- **Manage the competitive labor market** by allowing staff to work collaboratively from any location or device that makes them happy and productive (mobile phone, IP-DECT, Desk Phones, or Soft Phones)
- **Collaborate:** easily search and find available experts and collaborate with them in real-time over phone, messaging or video while servicing customers
- **Streamline onboarding and new account opening** with Mitel CRM Web Connectors and custom agent and employee desktops that optimize business processes
- **Mitel's flexible deployment and procurement options** allow you to choose the most cost-effective option for your business that maximizes employee productivity while reducing operating costs
- **Fraud Risk:** Mitel's ID verification and validation solutions use integrated voice biometrics from 3rd party partners and multi-factor authentication to help keep fraudsters away
- **Regulatory Compliance*:** includes common controls via product features or through partnerships with providers like SecureCo and Sycurio to help you address security, privacy, and anti-fraud requirements in your regulated environments
- **Operational Flexibility:** Mitel's Communications Platforms, Collaboration, and Contact Center applications are flexible enough to be deployed on your premises, in your private cloud, or in the public cloud as a dedicated instance for optimal security
- **Extensible:** easily integrate to your front and back-office systems using packaged and customized integrations



Streamline your daily communications workflows

Mitel's Unified Communications and Customer Experience platforms can be integrated with many leading applications used across finance including popular ones such as Mitel for Salesforce, Jack Henry and Fiserv.

If we do not have the integration you're looking for, it can easily be built with our open APIs:

- Fraud Alerting
- Voice Biometrics
- Customer Relationship Management (CRM)
- Enterprise Resource Planning (ERP)
- Workforce Optimization
- Virtual Assistants



Mitel Financial Services Solutions integrate with:

[Salesforce](#)

[SAP](#)

[Microsoft Dynamics](#)

[Worldplay from FIS](#)

[Sycurio](#)

[Zendesk](#)

[Talkative](#)

[Twilio](#)

[Jack Henry Symitar, Episys, Silverlake](#)

[Fiserv](#)

[Pivotal CRM](#)

How the Right Communications can **DRIVE RESULTS**



Retain and Attract Customers

Mitel CX Solutions have assisted customers to improve FCR, CSAT, and NPS scores which are important to retain existing customers and attract new ones.



Increase Margins and Profitability

Steer routine customer interactions to low-cost virtual assistants and allow human agents to deliver more personalized customer care.



Regulatory Compliance*

Over 8,000 Banks and Credit Unions all over the world trust Mitel Financial Services Solutions in their regulated environment.



Mitigate Fraud Risk

Improve and automate identity management and validation with speech biometrics, fraud alerts, and multi-factor authentication with 3rd party integrations.

“

The virtualized Mitel technology has allowed us to realize the business benefits we needed to achieve, along with substantial cost savings.”

Duncan Borland,
Infrastructure Manager, FirstPort



Helping you comply with Financial Services industry regulations*

Financial institutions will always have to deal with high value, sensitive data, which is put at even greater risk in uncontrolled environments such as home working. This highly regulated environment places a high burden on data protection, privacy, and security compliance. Regulations such as the EU's General Data Protection Regulation (GDPR) don't stop just because someone is working from home. Mitel Financial Services Solutions include controls commonly used to address regulatory requirements for both back-office workers and customer experience advisors.

Mitel Financial Services Solutions provide common controls via product features or through partnerships with providers like SecureCo and Sycurio to help you address security, privacy, and anti-fraud requirements in your regulated environments (e.g., PCI DSS, GDPR, HIPAA, Dodd Frank Act, and MiFID II)*.

Mitel Financial Services Solutions

Mitel Financial Services Solutions empower your staff to communicate and collaborate with employees and customers with industry standard security and reliability across devices, delivering real business results. Improve your customer experience, better mitigate fraud risk with 3rd party integrations, and improve your bottom line with Mitel Financial Services Solutions.

[Contact us to learn more about Mitel Financial Services Solutions](#)

*Controls available to customers to address customer regulatory requirements vary based on specific Mitel product capabilities and components and may be delivered via one or more Mitel products, Mitel Solutions Alliance (MSA) partner solutions, or a demonstrated integration to a 3rd party solution via Mitel Professional Services and may require additional corporate IT controls. Product specifications are documented as part of Mitel's publicly available documentation for the applicable product, partner solution or professional service integration. For more information regarding Mitel's ability to help customers comply with regulatory standards, please contact your Mitel Representative or Channel Partner.

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